

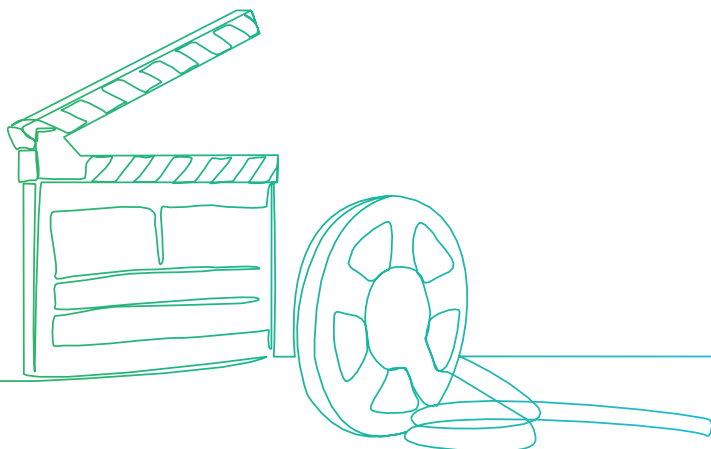
2026

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Little J and Big Cuz
Image source: ABC.



Glossary

Acronym	Term
ABC	Australian Broadcasting Corporation
ACER	Australian Council for Educational Research
ACMA	Australian Communications and Media Authority
BVOD	Broadcast video on demand
FTA	Free-to-air TV (includes commercial and public broadcasters)
FTE	Full-time equivalent
GDP	Gross domestic product
PDV	Post, digital and visual effects
PSRs	Parasocial relationships
SVOD	Subscription video on demand
TV	Television
VOD	Video on demand



The Piano: Host Amanda Keller watching with Dom's mother as he plays the piano in Central Station, Sydney in the inspiring documentary series The Piano – photographer: Stuart Bryce, Fremantle Media.
Image source: ABC.

Austin S1: Julian (Ben Miller) with Ingrid (Sally Phillips) and Austin (Michael Theo)



Executive summary



Key findings



**\$772
million**



ABC-commissioned screen productions contributed \$772 million in value added to the Australian economy between 2022-23 and 2024-25

**7,700
FTE roles**



ABC-commissioned screen productions in Australia supported over 7,700 FTE roles cumulatively between 2022-23 and 2024-25

**315
productions**



Between 2022-23 and 2024-25, the ABC supported 315 screen productions, delivering over 1,526 hours of locally produced programming

**\$1.31
for every
ABC dollar**



For every dollar spent by the ABC on external commissions, a further \$1.31 was leveraged from other sources on average between 2022-23 and 2024-25

**\$2.4
billion
audience value**



The audience value of ABC-commissioned content that was broadcast is estimated at \$2.4 billion in 2024-25

**5.4
million
weekly viewers**



ABC-commissioned content on broadcast television had a reach of 5.4 million weekly viewers in 2024-25

**1,526
hours
produced**



From 2022-23 to 2024-25, the ABC-commissioned 1,526 hours of content

**1:3
supported
FTE jobs**



For every ABC employee working on screen productions, three additional jobs were supported over 2022-23 to 2024-25

**79% of
Australians**



79% of Australians see the ABC as distinctly Australian and contributing to national identity

**86 hours
of children's
content**



The ABC produced 86 hours of high-quality children's content in 2024-25, supporting children's cognitive, language, and social-emotional development

Executive summary

The Australian Broadcasting Corporation (ABC) plays a unique role in commissioning, producing, and broadcasting Australian screen content that reflects the nation's culture, identity, and diversity.

The Australian screen sector is facing major disruption as shifting audience habits, digitisation, and global competition change how Australians access content. In this media landscape, where there has been changing investment in local drama and children's content, ABC-commissioned productions play a role in sustaining national storytelling.

This report, undertaken by Deloitte Access Economics on behalf of the ABC, estimates the economic contribution of ABC-commissioned screen productions. The analysis focuses exclusively on ABC-commissioned screen productions from 2022-23 to 2024-25, including both internally and externally produced content, but excluding news and current affairs. Building on the 2021 report for the ABC, *Economic contribution of screen productions commissioned by the ABC*, this report also considers the cultural and social benefits of ABC productions and their unique role in supporting children's wellbeing.

315 Australian titles produced in the last three years

Renowned for its strong editorial credibility and globally recognised brand, the ABC is recognised for producing high-quality Australian content. In 2024-25, it was the largest commissioner of Australian content in both drama and children's drama, contributing to 13 of the 18 drama titles invested in by free-to-air (FTA) broadcasters, as well as four of the five children's drama productions.¹

Between 2022-23 and 2024-25, the ABC was involved in **315 screen productions**, delivering over **1,526 hours of locally produced programming** across drama, comedy, documentary, factual, and children's genres.

Viewed as distinctly Australian by 79% of the population, the ABC plays a key role in shaping national identity. In 2024-25, **weekly viewership of ABC-commissioned broadcast content reached 5.4 million** – up 2% from 2022-23 – demonstrating its continual audience value which, for broadcast content, is estimated at \$2.4 billion in 2024-25.

The ABC is an industry leader

ABC programs resonate with Australian audiences and champion Australian creative talent. With **81% of Australians wanting more locally made television**, the ABC caters to this audience.

The ABC is a unique storyteller, delivering high-quality Australian content that resonates with both the industry and local audiences. In 2025, the **ABC claimed 11 of the 23 possible Logie Awards**, reflecting quality Australian content across a diverse range of genres, including comedy, drama, reality, and children's programming.

Key Statistics



315

local titles produced by the ABC in the three years to 2024-25



1,526

hours of locally produced programming from 2022-23 to 2024-25



\$772 million

in value added to the Australian economy between 2022-23 and 2024-25



7,700

FTE roles cumulatively supported by ABC-commissioned screen productions between 2022-23 and 2024-25

Executive summary

\$772 million in value added to the Australian economy

Quality content commissioned by the ABC plays a key role in the screen sector. Between 2022-23 and 2024-25, ABC commissioned screen productions contributed **\$772 million in value added to the Australian economy**. This is a \$28 million increase from \$744 million in value added between 2017-18 to 2019-20.* Over 70% of this value added to Australia's Gross Domestic Product (GDP) was through direct contributions from the labour and capital employed on ABC screen productions.

ABC internal productions and externally commissioned works also supported over **7,700 full-time equivalent (FTE) roles** cumulatively from 2022-23 to 2024-25. This means for every ABC employee working on screen productions, **three additional jobs** were supported.

The ABC's exports amplify Australian stories

The ABC leverages its distribution network, partnerships and strong brand to export Australian content globally, showcasing programs like *Bluey* and *Muster Dogs*. These exports generate **commercial returns, promote Australian values, and enhance tourism appeal**, while supporting local producers by allowing them, in some cases, to **retain intellectual property rights**. This means stories are told that resonate with Australians and can be shared across the globe.

**The economic contribution of screen productions commissioned by the ABC was modelled by Deloitte Access Economics in 2021. This updated study uses a comparable economic contribution methodology, however the ABC now recognises expenditure associated with production funding at the time of broadcast (previously, this was recognised at the time of commissioning). Therefore, caution should be exercised when comparing trends in production funding between the 2026 and 2021 reports.*

Spending by the ABC catalyses other investment

Screen productions supported and developed by the ABC are recognised for their quality and editorial rigour, which attracts independent and government funding sources. **For every dollar spent by the ABC on external commissions, an additional \$1.31 was leveraged** from other sources on average from 2022-23 to 2024-25.

The ABC supports children's wellbeing

With **3.2 million average weekly viewers of ABC broadcast children's content** in 2024-25, the ABC is an avenue for investment in children's programming. Research shows that high-quality content, like that commissioned by the ABC, delivers significant developmental benefits, including improved **cognitive and language skills**, stronger **social and emotional learning**, and greater **creativity**.

In 2024-25, the **ABC produced 86 hours of children's programming**, with **31% of children's productions on air being Australian**. The ABC plays a vital role in offering quality educational programming, which supports early **engagement**, higher **educational attainment**, improved **employment prospects**, greater **lifetime earnings**, and stronger **social participation**.

Australia's screen sector – and ABC-commissioned screen productions – are vital to the nation's creative industry and cultural identity, while also making a significant contribution to the broader economy.

Key Statistics



\$1.31

leveraged from other sources for every dollar spent by the ABC on external commissions



79%

of Australians see the ABC as distinctly Australian



5.4 million

weekly viewers of ABC-commissioned broadcast content in 2024-25



3.2 million

average weekly viewers of ABC broadcast children's content in 2024-25



31%

of children's productions on air in 2024-25 on the ABC were Australian



1. Introduction

Introduction

Driving Australian screen content and industry resilience.

The Australian Broadcasting Corporation (ABC) is Australia's national public broadcaster, with a mandate to provide all Australians free access to high-quality, original content across television, radio, and digital platforms. Established under a statutory Charter, the ABC plays a unique role in commissioning, producing, and broadcasting Australian screen content that reflects the nation's culture, identity, and diversity.

The ABC's screen productions span a wide range of genres, including drama, documentary, factual, comedy and children's programming. These are delivered through multiple platforms - linear broadcast, ABC iview, and digital services ensuring broad reach and accessibility for audiences regardless of location or income.

The ABC's role within the screen sector

As the screen sector evolves with the rise of international streaming platforms and shifts in audience behaviour, the ABC continues to act as a stabilising force in the Australian industry. The ABC has remained a consistent commissioner of new local content, supporting creative talent and sustaining production capacity. Its role as a trusted commissioner helps safeguard Australian voices and stories in an increasingly globalised media landscape.

Each year, the ABC commissions and broadcasts a substantial volume of original Australian content. Between 2022-23 and 2024-25, the ABC was involved in 315 screen productions, delivered over 1,550 hours of locally produced programming across drama, comedy, documentary, factual, and children's genres in 2024-25 on the ABC TV main channel.¹

Figure 1.1: Overview of the ABC's contribution to local content



315
productions



1,526
hours of
local content



500+
hours first-
release content

Source: Deloitte Access Economics based on ABC data provided to Deloitte and ABC 2024-25 annual report.

Note: Hours are across drama, comedy, documentary, factual, and children's genres.

In 2024-25, the ABC broadcast more than 1,500 hours of first-release Australian content (excluding news and current affairs) across its television services.² On the digital front, ABC iview continues to be Australia's largest free-to-air (FTA) streaming service by viewership, with an average weekly consumption of eight million hours accounting for a 25% share of all FTA Broadcast Video on Demand (BVOD) minutes viewed.³ This scale positions the ABC as one of the country's largest commissioners and distributors of Australian screen content, providing both depth and breadth across genres and platforms.

The ABC's sustained investment into the Australian screen sector delivers benefits beyond programming outputs. Screen productions generate jobs and income for cast, crew, and creative businesses, stimulate co-investment from domestic and international partners, and help build the skills base of the industry. Socially, ABC productions provide free, universal access to trusted Australian stories, showcase diverse and regional perspectives, and offer children safe, high-quality programming that supports learning and wellbeing. In doing so, the ABC contributes to both the resilience of the screen sector and the broader social fabric of Australia.

The ABC has engaged Deloitte Access Economics to undertake an economic contribution study of ABC-commissioned screen productions to analyse and explore these benefits. The purpose and scope of this report is outlined on the page following.



Muster Dogs
Image source: ABC.

Introduction

This report examines the economic contribution and social and cultural benefits of the ABC's screen commissioning activity.

This report

The ABC has engaged Deloitte Access Economics to estimate the economic contribution of ABC-commissioned screen productions. The analysis focuses exclusively on commissioned content, excluding news and current affairs and the ABC's other services (such as ABC radio, the ABC news app, podcasts, or newsletters). Recognising the varied value of Australian screen productions, the study applies multiple approaches to capture the holistic contribution of ABC commissions to the Australian economy and society.

This report quantifies the economic contribution of ABC-commissioned screen productions over the 2022–23 to 2024–25 financial years, while also assessing their broader value to audiences, the screen industry, and the Australian community. In addition to economic metrics, the report considers the cultural and social benefits of ABC productions and their unique role in supporting children's wellbeing. The remainder of the report is structured as follows:

- **The screen sector in 2025** – Examines recent trends, technology shifts, and challenges in the Australian screen landscape and analyses ABC's unique role in the production sector.
- **Economic contribution** – Quantifies the economic contribution of ABC-commissioned screen productions, including contribution to gross domestic product (GDP) and jobs. All economic contribution values are reported in 2024–25 dollars.
- **Audience value** – Analyses the ABC's content by genre to assess the breadth and depth of its programming while highlighting the cultural value of Australian content through case studies.
- **Children's wellbeing and development benefits** – Assesses the ABC's role in educational and safe children's programming, highlighting wellbeing and development impacts.



The Piano

Image source: ABC.

Data sources

This report's results are informed by various data sources, including:

- a bespoke data request to the ABC, including financial and operational expenses and sources of revenue, expenditures and data related to programs, funding and audience*
- consultations with the ABC and external stakeholders to support case study development and provide subject matter expertise
- desktop review of publicly available data relating to the ABC's commissioning of screen content and broader screen sector.

*All production expenditure and employment data was provided by the ABC and has not been independently verified by Deloitte.

Plum



2. The screen sector in 2025

Image source: ABC.

The screen sector in 2025

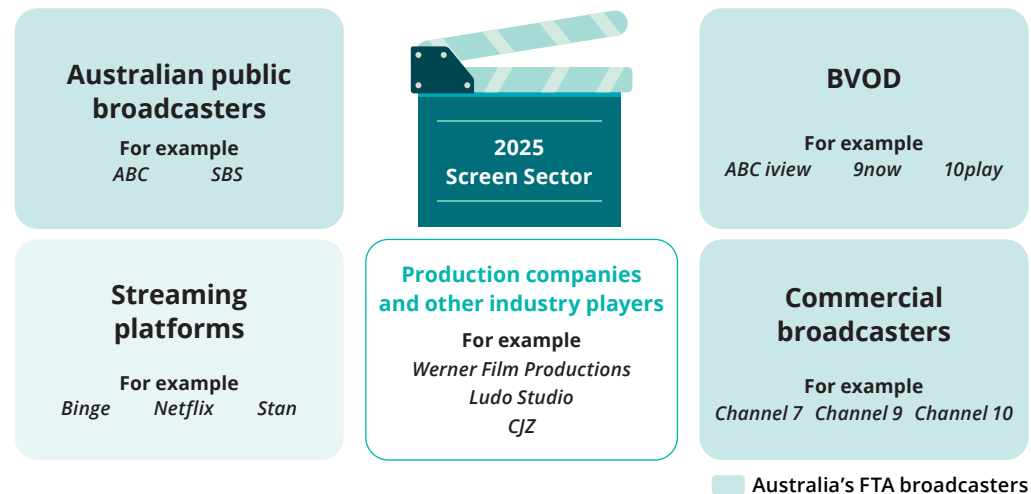
Australia's screen industry is a complex network of players who contributed over \$7 billion to Australia's GDP in 2023-24.

Australia's screen landscape

Australia's screen landscape is a vital component of the country's creative industry and cultural identity, contributing over \$7 billion to Australia's GDP in 2023-24.^{1*} 'Screen' refers to narratives or creative content told through screen platforms.² Traditionally focused on film and television, 'screen' now includes content delivered via computers, smartphones, and tablets – such as apps, online content, and subscription video on demand (SVOD) and BVOD services.

The industry is a complex network of players, ranging from small individual producers to large multinational studios and production companies, major distributors and broadcasting companies with production arms or subsidiaries. These screen businesses vary widely in their structure, activities and revenue streams, across media and genres.

Figure 2.1: Australia's screen landscape



Source: Deloitte Access Economics with data from Australian Communications and Media Authority (ACMA) and OzTAM.

Note: Examples of streaming platforms, broadcasters, and production companies are representative and do not constitute an exhaustive list.

*Refers to 'Film and Television activities as per Australian and New Zealand Standard Industrial Classification 2006 class codes.

Industry trends impacting screen content

International competition changing market dynamics

The Australian FTA market, including commercial and public broadcasters, now compete with global streaming giants, intensifying pressure on local industry. SVOD licensing and international distribution are reshaping the funding, sharing and global positioning of Australian content.

Fragmentation of viewing and globalisation of content

Global players often have large budgets, attract top talent, and flood the market with diverse international content offerings. In response, viewing habits for linear TV are changing, with the use of video-on-demand (VOD) services growing.³

Industry disruption has driven up production costs

Recently, Australian television production costs have risen at an average annual rate of around 16%.^{4**} The relatively high cost of scripted drama limits commercial returns, and genres like documentary, factual, and children's yield even lower returns, resulting in reduced investment.

Local content requirements change in response to commercial realities

In 2021, Australian content quotas were updated, and genre-specific requirements were removed. This change has helped commercial broadcasters adapt to rising costs and declining advertising revenue as budgets shift toward online platforms.⁵

Investment in Australian drama has been disrupted

Updates to local content requirements and other industry changes have impacted broadcast hours of Australian drama and children's programs.⁶ In 2024-25, overall spend on children's productions was 44% below the five-year average.⁷

**Calculated as a compound annual growth rate using ABS Film, Television and Digital Games data from 2016 to 2022 and includes both production and post-production costs for television programs.

Australia's policy response to an industry under pressure

Increased competition and higher costs have made producing local content less viable. Updates to Australian screen policies aim to address these challenges while continuing to support local content.

The screen industry faces challenges funding local screen content

High production costs, particularly for scripted drama, documentary, and children's programming, combined with fierce competition from streaming services, is increasing pressure on investment in Australian productions. Some networks have had to reduce or shift their commissioning of local productions to remain competitive, resulting in less locally produced screen content in certain genres.⁸

Australian screen content plays a vital role beyond just entertainment

Commitment to maintaining Australian content is grounded in the widely accepted understanding that screen and television can promote Australians' cultural identity, reflects the diverse stories and experiences of its people, and supports cultural sovereignty. Governments also recognise the economic benefits of a thriving Australian screen production sector, including job creation and international exports.

To ensure these cultural, social and economic benefits are realised, governments have long recognised that content quotas and policy incentives are essential to ensure Australians have access to a diverse range of local screen content.

New local content requirements in response to changing sector and commercial realities

The 2021 *Broadcasting Services Act* reforms introduced a more flexible, budget-weighted quota model that television broadcasters are required to comply with. Key updates included:

- Separate quotas for drama, documentary, and children's programming were replaced with a single 55% overall local content target.*
- Points are weighted by production budget, where higher-budget productions, particularly drama, earn more points.⁹

In November 2025, the Federal Government announced new local content requirements for streaming services with over one million Australian subscribers. SVOD platforms will be required to invest 10% of their total Australian expenditure or 7.5% of their revenue in new Australian drama, children's, documentary, arts, and educational programs.¹⁰ Lags in the production cycle, from concept to transmission, means that this change may take some time to be realised on screen.

Media policies have modernised to strengthen incentives for Australian content production

The Producer Offset remains a crucial funding tool to support Australian producers in unlocking the economic and cultural benefits that comes with producing local content. By providing tax rebates, 40% for feature films and 30% for television and other eligible productions, the offset helps producers with important financing decisions early on.¹¹ The 2022 Federal budget raised the television rebate from 20% to 30%, intended to strengthen the domestic production sector, support larger-scale productions, and help Australian content compete globally.

In July 2024, Australia enacted new "prominence" laws requiring smart TV manufacturers to ensure local content is clearly accessible on home screens, recognising the role smart TVs and connected platforms increasingly play as gatekeepers for Australian media. This sought to ensure that local FTA TV services can be easily found on connected devices, to enable contributions to Australia's public and cultural life.¹²

At the same time, the Government recognised the cultural significance of key national sporting events and updated the federal Anti-Siphoning Scheme to include online streaming services. This change prevents major national sporting events from moving behind paywalls until FTA broadcasters have had the first opportunity to secure them.

State-level production incentives have expanded over the past five years, complementing federal incentives.

Australia's states and territories offer competitive rebates and grants for productions filming locally or using post-production, sound, music, and visual effects services within their regions. These rebates, ranging from 8% to 20% for production attraction and Post, Digital & Visual Effects (PDV), can be combined with federal rebates, substantially boosting funding for local productions – including those commissioned by the ABC.¹³ This strong state-level investment underscores a clear commitment to building Australia's screen industry capacity and highlights the economic benefits that screen productions bring to regional economies.

*The Broadcasting Services Act 1992 requires commercial TV licensees to broadcast 55% Australian content on primary channels and 1,460 hours on non-primary channels between 6am and midnight.

The role of the ABC

In a disrupted media landscape marked by declining local content, recent screen policy reforms and the ABC's investment in Australian production play a vital role in sustaining national storytelling.

Where the government faces pressure to support local content, the ABC is part of the solution.

The ABC is bound by its Charter to provide content that “contributes to a sense of national identity and informs and entertains, reflecting the cultural diversity of the Australian community.” This legislative mandate requires the ABC to deliver “innovative”, “comprehensive broadcasting services of a high standard”, and “broadcast programs of an educational nature”.¹⁴ This positions the ABC uniquely within Australia's media landscape as an essential vehicle for advancing government priorities related to local content and cultural sovereignty.

While government policies and quotas aim to support local content across the industry, the ABC consistently exceeds these requirements, effectively safeguarding the production of high-quality Australian programming – including scripted drama, educational programs, entertainment, documentary and children's content.

As audiences shift from tightly regulated broadcast platforms to less regulated online streaming platforms, the effectiveness of government intervention in the broader industry diminishes. However, the ABC remains an established, effective and trusted policy instrument, ensuring the production and availability of Australian content.

The ABC plays a critical role in maintaining cultural sovereignty and public interest broadcasting where private markets may falter.

By commissioning content with clear public benefits that may not always be commercially viable, the ABC meets the diverse needs of Australian audiences and helps sustain the country's cultural and democratic fabric amid increasing globalisation of content.

As a national public broadcaster, the ABC plays a crucial role in the digital era by offering free, accessible content across all platforms and devices, meeting audiences where they are.

The ABC is transitioning to integrate digital platforms like ABC iview with its traditional FTA broadcast services. This dual approach is essential to future-proof Australian content delivery, ensuring the ABC meets the evolving preferences of diverse audiences while continuing to serve those who depend on traditional broadcast television. This commitment to free and accessible content is especially significant in 2025, when the average household was spending \$78 per month on media subscriptions.¹⁵

ABC iview is enabling younger and digitally connected Australians to access news, entertainment, and stories on demand. At the same time, FTA television remains crucial for many with around 60% of Australia's tuning into broadcast TV during the quarter ended September 2025.¹⁶ Live FTA TV audiences are watching for an average of just under 7 hours per week.¹⁷ This includes segments of the community in regional and rural areas who have less access or lower adoption rates of digital platforms. The ABC's commitment to scheduled programming ensures these viewers continue to receive informative, educational, and entertaining content in a format suited to their needs.

By balancing innovation with tradition, the ABC sustains its core Charter objectives to inform, educate, and entertain but also strengthens its vital role in Australian culture and storytelling amid a disrupted and competitive media landscape.

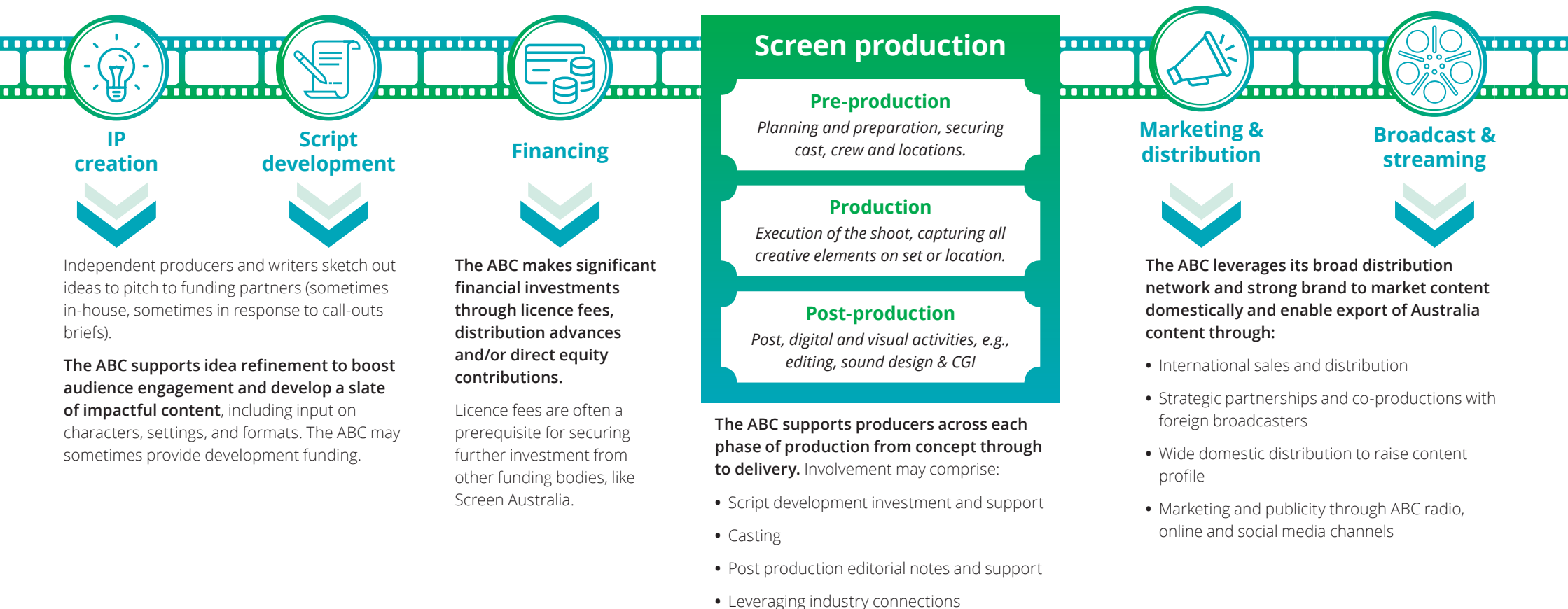


The ABC's value in the screen production life cycle

To effectively deliver high-quality local content to Australians, the ABC's commissioning model supports broader industry investment and growth, adding value at every stage through close collaboration and strong creative and production support.

The ABC creates screen content through two primary avenues: internal productions, produced entirely by the ABC, and external co-commissions, developed in partnership with independent producers. In both cases, the ABC is actively involved throughout the entire screen production lifecycle, leveraging its extensive infrastructure, industry networks, and distribution channels. Given the complexity of the screen industry, the journey from idea to screen rarely follows the same path for any two productions. Some projects are conceived, financed, produced, and distributed entirely by a single entity. Others are the product of co-productions with multiple companies, each fulfilling a distinct role.

Depending on the project, the ABC may be involved in any or all these stages:



The ABC's investment role in leveraging wider finance for screen productions

The ABC's investments leverage wider industry funding, enabling the creation of high-quality Australian programs efficiently through shared infrastructure.

The ABC plays a key market enabler role in the financing stage of a screen production. Through its commissioning activity, brand credibility, and early funding commitments, the ABC helps attract additional private and public investment that might not otherwise flow into Australian screen production. In particular, the ABC's co-commissioning partnerships with independent producers strengthens the broader production sector and help bring Australian stories to the screen. Between 2022-23 and 2024-25, around half of all ABC productions were delivered through external commissions.

The ABC's investment in external commissions play a catalytic role in the Australian sector. **For every dollar spent by the ABC, an additional \$1.31 in investment is leveraged from government and other sources.*** Over one-third of this additional funding was from private sources.

The equivalent ratio from 2017-18 to 2019-20 was \$1.11. This change can be driven by a variety of factors, including higher relative external funding (e.g., higher government grant/incentives expenditure, larger budget projects drawing in more private/public investment) and/or lower relative ABC funding for co-commissions.

While the ABC provides development funding through its Business Affairs team – support that can be critical for shaping early ideas into viable projects – its principal role is to commit as the commissioning partner. In industry terms, this commitment is the “market attachment” that acts as an anchor to multi-source financing. This includes avenues such as the Screen Australia grants/investment and state screen agency finance/rebates, which require some degree of market attachment. Financing is also sourced from commercial screen partners in exchange for international distribution rights, or through co-production partners in the form of equity. In this way, the ABC's ability to secure market attachment and draw in external investment through its reputation and brand power significantly amplifies the impact of its own commissioning.

Table 2.1: Total ABC funding for external commissions (\$ million, nominal)

2022-23	2023-24	2024-25	Total
87.3	96.5	90.9	274.7

Source: ABC (2025)

From 2022-23 to 2024-25, the ABC contributed \$275 million to external co-commissions, equating to approximately **43%** of a production's budget on average. Overall, the ABC's investment led to the creation of **156** titles across Australia, spanning a diverse range of genres.

The ABC is consistently recognised for delivering high-quality programming. In 2025, 84% of ABC iView audiences rated the ABC as the best or a good source of quality content compared to competitors.¹ Given their relatively fixed size of core/overhead functions, the ABC is able to efficiently deliver this high-quality content. Indeed, from 2022-23 to 2024-25 an external co-commissioned title was produced for every \$1.8 million of ABC funding (on average).

Figure 2.2: Ratio of ABC to external funding on co-commissions (avg. 2022-23 to 2024-25)

\$1 in ABC funding = \$1.31 additional investment



Source: Deloitte Access Economics based on ABC data (2026)

*External funding data is budgeted, actuals may vary.

ABC commissions across Australia

While commissioning activity was primarily concentrated in New South Wales and Victoria, the ABC commissioned screen productions nationally.

Between 2022-23 and 2024-25, the ABC supported 315 screen productions, with nearly an equal split between internal productions (produced entirely by the ABC) and external co-commissioned productions (developed in partnership with independent producers).

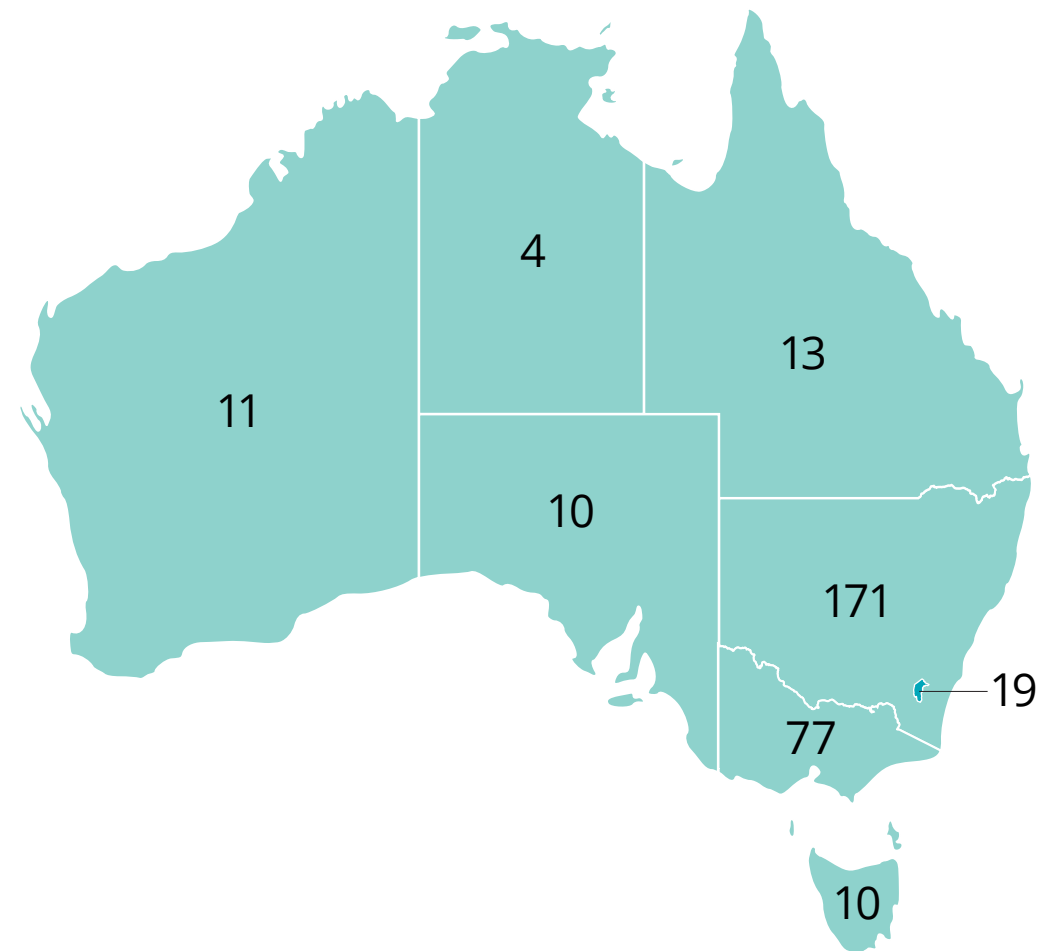
Each production is notionally allocated to a state where majority of the filming took place, however, few productions are wholly completed within one jurisdiction.

For some productions, there may be multiple filming locations, which can be widely dispersed, while pre- and post-production activities may occur in different locations again. This means the total expenditure associated with a production may not stay in its 'allocated' state due to production activities occurring in multiple places



Bay of Fires
Image source: ABC.

Figure 2.3: Total production projects allocated to a jurisdiction, 2022-23 to 2024-25



Source: Deloitte Access Economics based on data provided by the ABC (2026).

Notes: Values presented include both ABC internal productions and externally commissioned productions.

Case study | The Piano

In May 2025, the ABC premiered *The Piano*, an uplifting six-part arts documentary series hosted by Amanda Keller and produced by Eureka Productions. The show celebrates everyday Australians from diverse backgrounds playing pianos placed in public spaces such as train stations and malls across Sydney and Melbourne. Season 1 attracted an average audience of 1.6 million Australians per episode.

Described by *Variety* as “a feel-good celebration of music, community, and untapped talent”, the series brings communities together around the shared language of music, capturing how music serves as a powerful connector and source of expression for individuals from all walks of life.¹

Two renowned pianists, Harry Connick Jr. and Andrea Lam, select exceptional amateurs to receive mentorship and perform at a prestigious concert in Sydney’s City Recital Hall. As these pianists perform, personal stories unfold that reveal *The Piano*’s role in helping individuals navigate grief, anxiety, loneliness, and major life challenges.

The Piano was originally produced and successfully launched in the United Kingdom by Love Productions, a company also backed by Fremantle, which also backs Eureka. The show’s strong ratings in the United Kingdom made it an easy decision to pursue with an Australian broadcaster, with the ABC being the most logical fit. The ABC team that brought *The Piano* to Australia is the same team behind *Old People’s Home for Four Year Olds*, another heartwarming ABC program.

“At its core, *The Piano* is human stories of real Australians, told through a unique lens.”

– Sonya Wilkes, Eureka Productions

The ABC supported the production of *The Piano* both editorially and financially. The ABC worked collaboratively with Eureka Productions to sought a broad representation of identities and Australian lived experiences across age, background and culture. This involved engaging with community organisations, cultural and accessibility consultations, and extending outreach beyond traditional media channels to ensure a representative and equitable process.

The ABC brought a deep understanding of the importance of inclusive, values-driven storytelling. From development through to delivery, the production team’s audience-first approach helped elevate the project. The ABC’s commitment to public service broadcasting made them uniquely engaged and supportive creative partners.

The ABC plays a crucial role in providing a platform for community-benefiting factual content. Programs like *The Piano* exemplify this mission, offering Australian audiences’ stories that reflect their own experiences and identities.

The Piano delivers a hopeful and positive narrative, embodying the kind of journalism the ABC views as essential. In contrast to the often heavy and distressing nature of news and global events, Susie Jones, Head of Documentary and Specialist at ABC, emphasised the importance of creating content that “informs, moves, inspires, and instills hope”.

Social cohesion is another fundamental part of the ABC’s Charter that is reflected through *The Piano*. Without the public broadcaster fulfilling this role, there is a risk that these benefits, which include building connection and understanding within the community, would be lost.



The Piano

Image source: ABC.

Case study | The Piano

Parallel to the series, the ABC launched a nationwide social impact campaign rooted in the series' core themes of music and community. Called the 'Pop-Up Pianos' Initiative, the campaign's overarching aim was to foster community connection and social cohesion through publicly accessible community pianos, highlighting the power of music.

Through a nationwide call-out in partnership with ABC Classic and Piano Plus Australia, up to 20 Australian towns were selected to receive pre-loved community pianos.



The Piano
Image source: ABC.

"It will create more community. More people will come and have another space. It's one of the best gifts we've ever had."

— Joanne Brown, Eastern Hub Community Coordinator, Pop Up Piano recipient

This initiative's activation, aligned with the release of *The Piano* and the ABC Classic 100, featured concerts composed of local pianists, as well as participants from *The Piano* series where possible. These concerts areas were well-attended, creating spaces for people to celebrate local talent and the shared love of music.

The Piano Impact Campaign



Nominations to participate | **380 towns**



Pianos delivered | **19 pianos**



"Pop up piano" campaign content audience | **Over 2.2 million**



Record community turnout at Pop Up Piano launch concert | **250 attendees**

One standout success illustrating the campaign's community impact is *The Piano* received at the Eastern Hub in Geelong, an inclusive community centre offering activities for people of all abilities, ages, and backgrounds. During the COVID-19 pandemic, the centre lost both its choir and community piano. Organisers hope that the new piano will inspire the choir to return, a prospect that looks promising given the excitement and engagement *The Piano* has generated.

While it is too early to see what the long-term outcomes of the campaign will be, anecdotal accounts suggest it will inspire more people to take up the piano. Sonya Wilkes from Eureka Productions emphasised that "The Piano is an instrument that crosses all cultures, genders, ages, and backgrounds; yet it has never been celebrated like this before".

Separate to the 'Pop-Up Pianos' campaign, Baheer Skaik, a refugee from Gaza, was featured on *The Piano*, where he played piano for strangers after fleeing war-torn Gaza with his family. His story, shown through the program, deeply moved many, including the Australian Minister for Immigration, Tony Burke.

Inspired by Baheer's journey and talent, the Minister personally visited Baheer and his family in Melbourne and offered them permanent residency in Australia.

This story encapsulates the human connection fostered by ABC's *The Piano*, making a meaningful impact on communities across Australia, both large and small.



3. Economic contribution

Economic contribution of ABC-commissioned screen productions

This economic contribution analysis quantifies the direct and indirect value added and employment generated by ABC-commissioned screen productions in the three-year period from 2022-23 to 2024-25.

Economic contribution modelling was undertaken separately for internal productions (produced entirely by the ABC) and external co-commissioned productions (developed in partnership with independent producers). Results are presented separately overleaf.

To measure the economic contribution of ABC-commissioned screen productions, two primary measures are used: value added and employment, considering both direct and indirect activity.

- **Value added** measures the value of output (i.e., goods and services) generated by the ABC's in-scope productions as measured in the income to these factors of production (i.e., labour and capital). The sum of value added across all entities in the economy equals GDP. Given the relationship to GDP, value added can be thought of as the contribution of ABC-commissioned productions to GDP.
- **Employment** measures the number of workers that are employed. In this case, direct employment considers the full-time equivalent (FTE) roles involved across all productions, such as the work of producers, lighting crew, actors, and post-production crew. Many roles on productions are short-term, full-time gigs with overtime. The employment figures presented are the FTE positions across productions, annualised and summed. This means that FTEs may refer to the same person in the same role over the three years as an FTE each year, or an FTE may be comprised of a number of shorter production stints, summing to an FTE role.

The contribution of a screen production to the economy can be direct or indirect.

- The **direct** economic contribution is the value added created by labour and capital inputs employed directly on the productions. For example, the employment and wages of the cast and crew working directly on the productions.
- The **indirect** contribution is a measure of the demand for goods and services produced across the economy as a result of demand generated by the productions. This is often referred to as 'flow on' effects.

The total economic contribution is the sum of the direct and indirect economic contributions. All value-added figures presented in this report are in 2024-25 dollar terms.

For more information on the economic contribution methodology, refer to Appendix A.

The Economic contribution of screen productions commissioned by the ABC was modelled by Deloitte Access Economics in 2021. This updated 2026 report uses a comparable economic contribution methodology however it is important to note that the ABC now recognises expenditure associated with production funding at the time of broadcast (previously, this was recognised at the time of commissioning). Therefore, caution should be exercised when comparing trends in production funding between the 2026 and 2021 reports due to the change in when expenditure is recognised.



Economic contribution of ABC co-commissioned screen productions

ABC co-commissioned productions contributed \$632 million in value added to the Australian economy between 2022-23 and 2024-25, and were associated with approximately 6,800 FTE roles.

Externally commissioned co-productions are the key driver of the economic contribution of ABC productions. They make up over 80% of the total contribution, highlighting the ABC's role as a major commissioning partner. From 2022-23 to 2024-25, the ABC co-commissioned 156 productions, which contributed \$632 million in value added to the Australian economy. 70% of the value added was through direct contributions from the labour and capital employed on the productions.

Over that time, workers were employed in just under 6,800 FTE roles, with 0.3 indirect FTE roles supported for every 1 direct FTE role. Direct employment is measured by the direct jobs involved in screen productions. For external co-productions, this measure does not specifically represent ABC employees. It should be noted that FTE roles can include the same person across different roles.

Externally commissioned co-productions deliver broader spillover benefits. They strengthen the independent production ecosystem by creating employment, supporting skills development, and enhancing Australia's international screen reputation. Successful commissions can also generate enduring income through IP retention, licensing, and future co-production opportunities.

The estimated economic contribution across both internal and external productions is therefore likely to be somewhat conservative. While the analysis captures expenditure effects, downstream revenue opportunities are not captured as they occur well after initial production. Future sequels, remakes, and spin-offs can also deliver significant returns.

When comparing production expenditure data over time — including current levels and those historically modelled in the previous report, with adjustments for differences in expenditure recognition to ensure a like-for-like comparison — there is no consistent trend in production funding. Rather, funding levels fluctuate from year to year, reflecting the inherently volatile nature of production financing.

Table 3.1: Economic contribution of external commissions, 2022-23

	Direct	Indirect	Total
Value added (\$m)	\$161	\$67	\$228
Jobs (FTE roles)	1,276	552	1829

Table 3.2: Economic contribution of external commissions, 2023-24

	Direct	Indirect	Total
Value added (\$m)	\$146	\$64	\$211
Jobs (FTE roles)	2,047	543	2590

Table 3.3: Economic contribution of external commissions, 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$135	\$58	\$193
Jobs (FTE roles)	1,901	468	2,369

Table 3.4: Economic contribution of external commissions, 2022-23 to 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$442	\$189	\$632
Jobs (FTE roles)	5,224	1,564	6,788

Source: Deloitte Access Economics modelling based on data provided by the ABC (2026).

Notes: All figures are in 2024-25 dollar terms. The results of the economic contribution of ABC external commissions relate to the total contribution of these productions to Australia's economy. These productions are funded by both the ABC and at least one other entity. All parties play a role in the resulting economic contribution, which cannot be solely attributed to any one entity.

Economic contribution of internal ABC-commissioned screen productions

ABC internal productions contributed \$140 million in value added to the Australian economy from 2022-23 to 2023-24, and were associated with over 900 FTE roles over the same period.

From 2022-23 to 2024-25, the ABC commissioned 159 internal productions which contributed \$140 million in value added to the Australian economy. \$99 million of the value added from internal commissions was from the ABC's direct component.

Further, the economic activity generated from internal commissions was associated with over 900 FTE roles across the three years. For every direct FTE role associated with internal commissions, there are an additional 0.5 indirect FTE roles supported throughout the economy. For internal productions, direct employment is measured by the number of FTE ABC employees working on screen productions. It should be noted that FTE roles can include the same person across different roles.

Like external co-commissions, internal commissions also deliver economic and strategic value that extends beyond production expenditure. They allow for full creative control and ownership of intellectual property, building a long-term content library and potential future revenue streams. These productions sustain stable employment within the ABC, preserve institutional expertise, and enable innovation by piloting new storytelling formats and technologies.

Internal ABC-commissioned productions play a crucial role in building industry capacity. They provide work for writers, directors, producers, actors, and crew, but also for the many specialists whose skills are essential to high-quality production – from set designers and editors to sound engineers and visual effects artists. Beyond the immediate jobs created, these productions act as training grounds where emerging practitioners can build their craft alongside experienced professionals. In doing so, the ABC supports the industry's long-term capacity, ensuring a diverse and highly skilled workforce capable of telling Australian stories for local and global audiences.

Table 3.5: Economic contribution of internal commissions, 2022-23

	Direct	Indirect	Total
Value added (\$m)	\$32	\$13	\$45
Jobs (FTE roles)	199	105	304

Table 3.6: Economic contribution of internal commissions, 2023-24

	Direct	Indirect	Total
Value added (\$m)	\$32	\$13	\$45
Jobs (FTE roles)	188	107	294

Table 3.7: Economic contribution of internal commissions, 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$36	\$15	\$51
Jobs (FTE roles)	218	120	338

Table 3.8: Economic contribution of internal commissions, 2022-23 to 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$99	\$41	\$140
Jobs (FTE roles)	604	332	936

Source: Deloitte Access Economics modelling based on data provided by the ABC (2026).

Note: All figures are in 2024-25 dollar terms.

Economic contribution of all ABC-commissioned screen productions

Over the three most recent financial years, ABC internal productions and externally commissioned works contributed \$772 million to the Australian economy and supported over 7,700 FTE roles cumulatively.

The total economic contribution of all ABC-commissioned productions reflects the total contribution of internal commissions and external commissions. The ABC plays a significant role in enabling these productions to contribute to Australia's economy, screen sector, and employment.

1:3

supported
FTE jobs

For every **ABC employee**
working on screen productions,
three additional jobs were
supported.

\$1.93

value added
generated

For every **\$1** the ABC
spends on commissioned
productions, **\$1.93 is**
generated in value added.

Investing in an export opportunity

Spending on ABC internal and externally commissioned productions mostly stays in Australia, supporting domestic supply chains and employment around the country.

Beyond this, the ABC's screen productions generate significant export value, extending the reach of Australian stories to global audiences. Programs such as *Fisk* and *Muster Dogs* have been sold into international markets, providing commercial returns while enhancing Australia's cultural presence abroad. These exports deliver a dual benefit: they generate revenue streams that support the sustainability of the domestic industry, and they promote Australian identity, values, and creativity on the world stage.

Through its ABC Commercial division, the ABC provides established distribution channels, strong brand recognition, and international partnerships that enable productions to reach diverse platforms and audiences, giving emerging producers greater market access and opportunities to grow their capabilities.

Table 3.9: Economic contribution of all ABC-commissioned productions, 2022-23

	Direct	Indirect	Total
Value added (\$m)	\$192	\$80	\$272
Jobs (FTE roles)	1,475	657	2,132

Table 3.10: Economic contribution of all ABC-commissioned productions, 2023-24

	Direct	Indirect	Total
Value added (\$m)	\$178	\$77	\$255
Jobs (FTE roles)	2,235	650	2,885

Table 3.11: Economic contribution of all ABC-commissioned productions, 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$171	\$73	\$244
Jobs (FTE roles)	2,118	588	2,707

Table 3.12: Economic contribution of all ABC-commissioned productions, 2022-23 to 2024-25

	Direct	Indirect	Total
Value added (\$m)	\$542	\$230	\$772
Jobs (FTE roles)	5,828	1,895	7,724

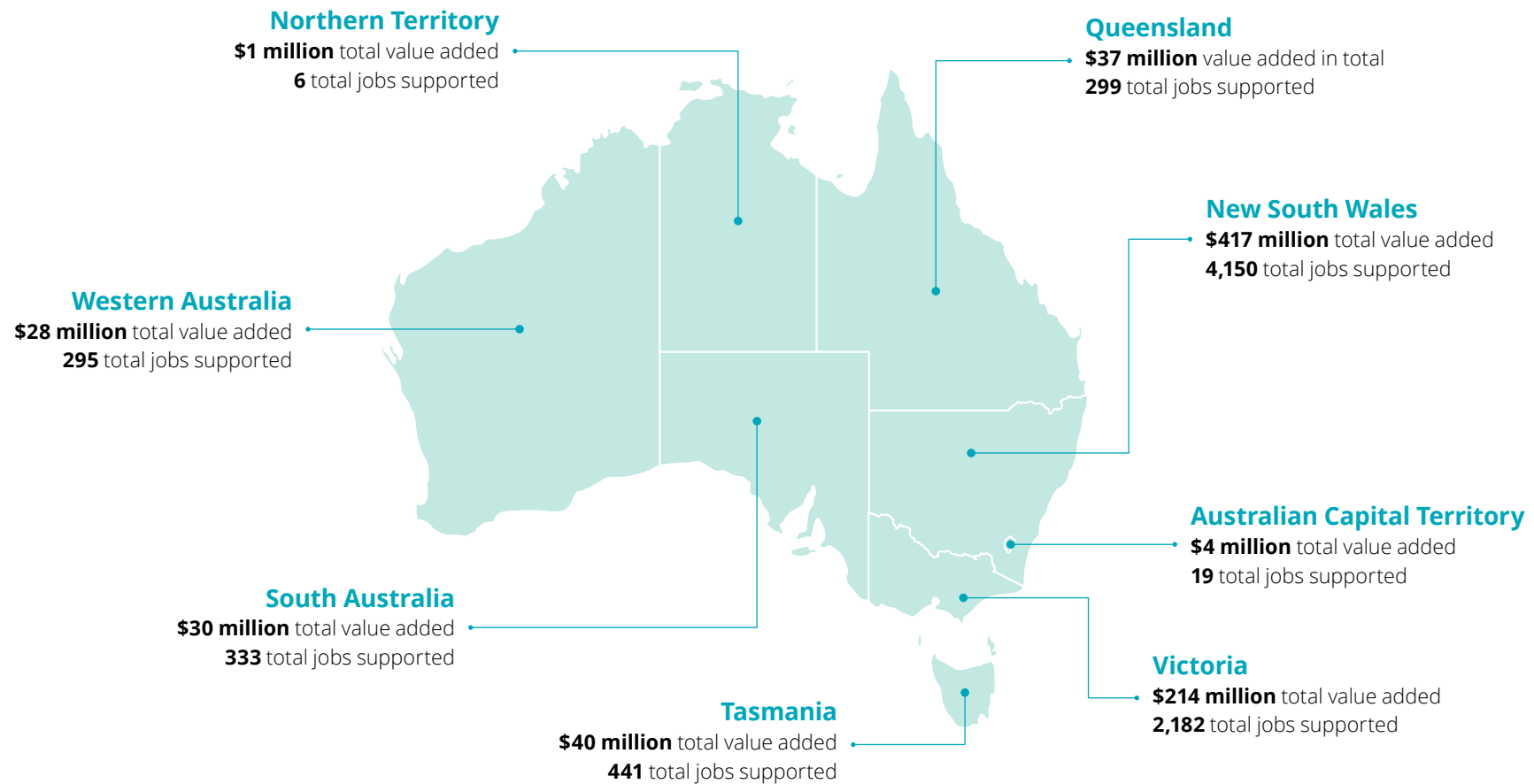
Source: Deloitte Access Economics modelling based on data provided by the ABC (2026).

Notes: Results presented include both ABC internal productions and externally commissioned productions. The results of the economic contribution of ABC external commissions relate to the total contribution of these productions to Australia's economy. These productions are funded by both the ABC and at least one other entity. All parties play a role in the resulting economic contribution, which cannot be solely attributed to any one entity. All figures are in 2024-25 dollar terms.

Economic contribution of ABC-commissioned screen productions

ABC-commissioned screen productions supported jobs and economic activity in every Australian state and territory.

Figure 3.1: Economic contribution of all ABC-commissioned productions, by jurisdiction, across 2022-23 to 2024-25



Source: Deloitte Access Economics modelling based on data provided by the ABC (2026).

Notes: Results presented include both ABC internal productions and externally commissioned productions. State breakdown does not add to total national contribution due to rounding. All figures are presented in 2024-25 dollars. The term 'jobs' refers to FTE employment.

Case study | Muster Dogs

Blending tradition, skill and heart, *Muster Dogs* brings regional Australia to national attention through authentic storytelling. *Muster Dogs* is a multi-season, factual series commissioned by the ABC and produced by Ambience Entertainment. The production follows multiple graziers across Australia as they train a litter of working dog pups in low-stress livestock handling – a method rooted in tradition, animal welfare, and sustainability.

Filmed in rural and remote communities across South Australia, Queensland, Victoria, Northern Territory, New South Wales, Tasmania and Western Australia, *Muster Dogs* offers an intimate, ground-level view of life on the land – elevating voices not often seen on screen and influencing how regional Australia is understood by metropolitan audiences.

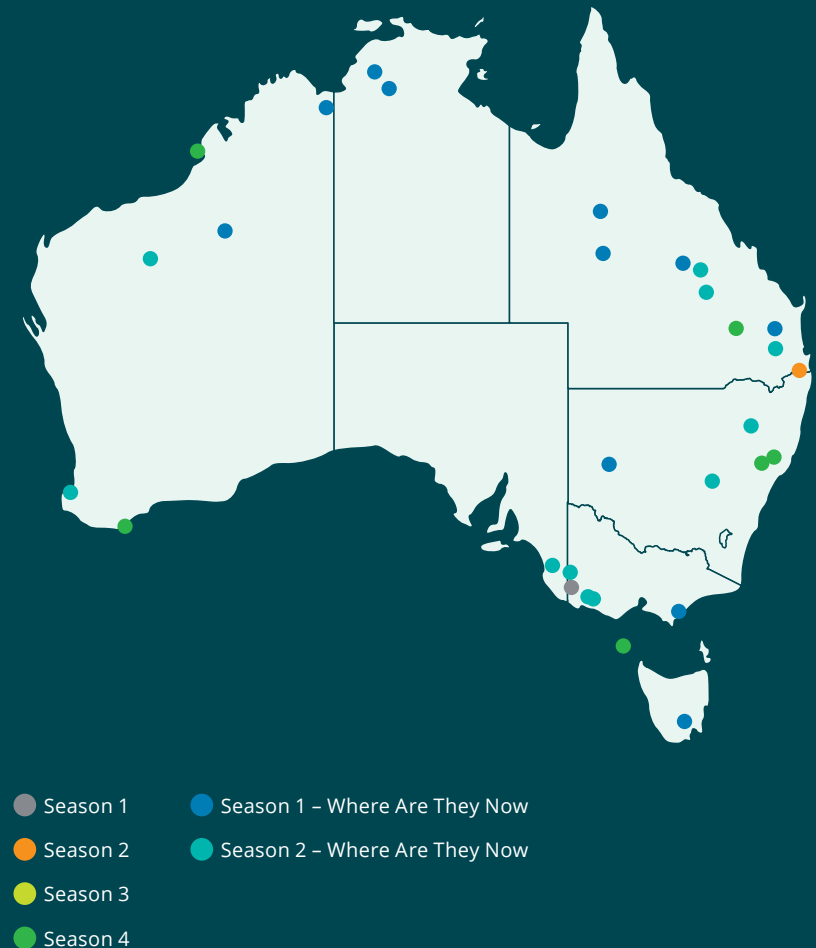
By following five pups and their trainers over 12 months, *Muster Dogs* presents a distinctly Australian story – grounded in practical knowledge and everyday life on the land. It invites viewers to see farmers not just as producers, but as skilled and compassionate caretakers of animals and country. More than a rural narrative, it reflects values that resonate widely such as hard work, humility, connection to place, respect for tradition, and care for others. The series director, Monica O'Brien, says this has supported a greater understanding of the work that goes into the food we eat, and a respect for the sacrifices required in the process. Consequently, the series has shifted perceptions, fostered empathy, and provided a point of connection across metropolitan and regional areas.

Reports from the team show positive feedback across multiple demographics and political affiliations, with every surveyed season achieving quality and distinctiveness scores exceeding 90%.¹ In response to this reception, a spinoff series *Muster Dogs – Where Are They Now* was created. The response from audiences speaks directly to the show's ability to foster empathy and shift perceptions:

.....
"We had no idea farmers cared about their livestock so much."
.....

"It's helped people understand what we do"
.....

Figure 3.2: Filming Locations for *Muster Dogs* and *Muster Dogs – Where Are They Now*



Source: ABC (2025)

Note: Some locations overlap and therefore will not be visible.

Case study | Muster Dogs

The success of *Muster Dogs* was underpinned by the ABC's industry expertise, national infrastructure and commitment to regional storytelling. The ABC's regional network provided access to COVID-safe travel routes and local community connections, while a network of highly-qualified editors and creative leads helped shape the show's narrative and format. Leveraging extensive data, knowledge and research from previous regional initiatives – such as *Back Roads and Landline* – the ABC team sourced compelling stories with a distinctly local focus. Despite limited marketing spend, national reach was achieved through cross-platform promotion across broadcast, on-demand services, ABC regional radio and news, and social media.

“The ABC have been an incredible partner on *Muster dogs*... the regional and local team were ferociously supportive”

– Monica O'Brien, Series Director

The result was one of the ABC's most successful factual programs in recent years, with more than 2 million audience engagements across its first three seasons.² **Regional viewers made up 40%** of the audience – well above the ABC's average of 30% – highlighting its significance in connecting regional viewers with authentic stories.³ In 2025, *Muster Dogs* won the **Logie Award for Best Structured Reality Program**, outperforming high-budget commercial franchises thanks to grassroots support, particularly from rural Australians who felt genuine ownership of the series.

The show also delivered tangible economic benefits. Produced by Ambience, a fully Australian-owned company, *Muster Dogs* ensured profits remained in Australia. Continued investment from the ABC allowed the creative team to remain intact across multiple seasons and pursue international format sales, supporting the domestic screen sector at a time of global industry contraction. On the ground, filming injected spending into regional communities through local employment, accommodation, catering, and creative services.

Since airing, the program has driven measurable outcomes:⁴

- Attendance at rural shows and working dog trials has doubled
- Farm stays in filming regions have reported a rise in bookings
- Enrolments in low-stress stock handling schools have tripled, particularly among younger Australians

Muster Dogs exemplifies the cultural and economic value of Australian screen content that is grounded in local experience but nationally relevant. It is also a clear demonstration of the ABC's unique public value – as a national broadcaster with the reach, resources and commitment to identify stories, shape them and deliver them to the nation.

“What *Muster Dogs*, the ABC and Frank Finger have done for Clermont, the agricultural industry and now for tourism in Australia is beyond incredible.”

– Kelly Vea Vea, Mayor of Isaac Region

Program Insights



Digital article engagement minutes
6.2 million



Low-stress stock handling school enrolments
x3



Social media video views
15.2 million



AACTA Awards 2025
Winner 2x AACTA awards



Audience engagements (S1-3)
2 million



Best Structured Reality Program
2025 Logie Winner

Source: Social and Digital Report, ABC Audience Data & Insights (2025)



4. Audience value

Audience engagement with ABC-commissioned screen productions (broadcast)

In 2024-25, approximately 5.4 million Australians watched ABC-commissioned broadcast productions each week (+2% since 2022-23), representing approximately 20% of the population.

Audience value of ABC-commissioned productions

The ABC holds a significant presence within the Australian media landscape, engaging millions through its diverse suite of content across FTA channels and digital platforms.

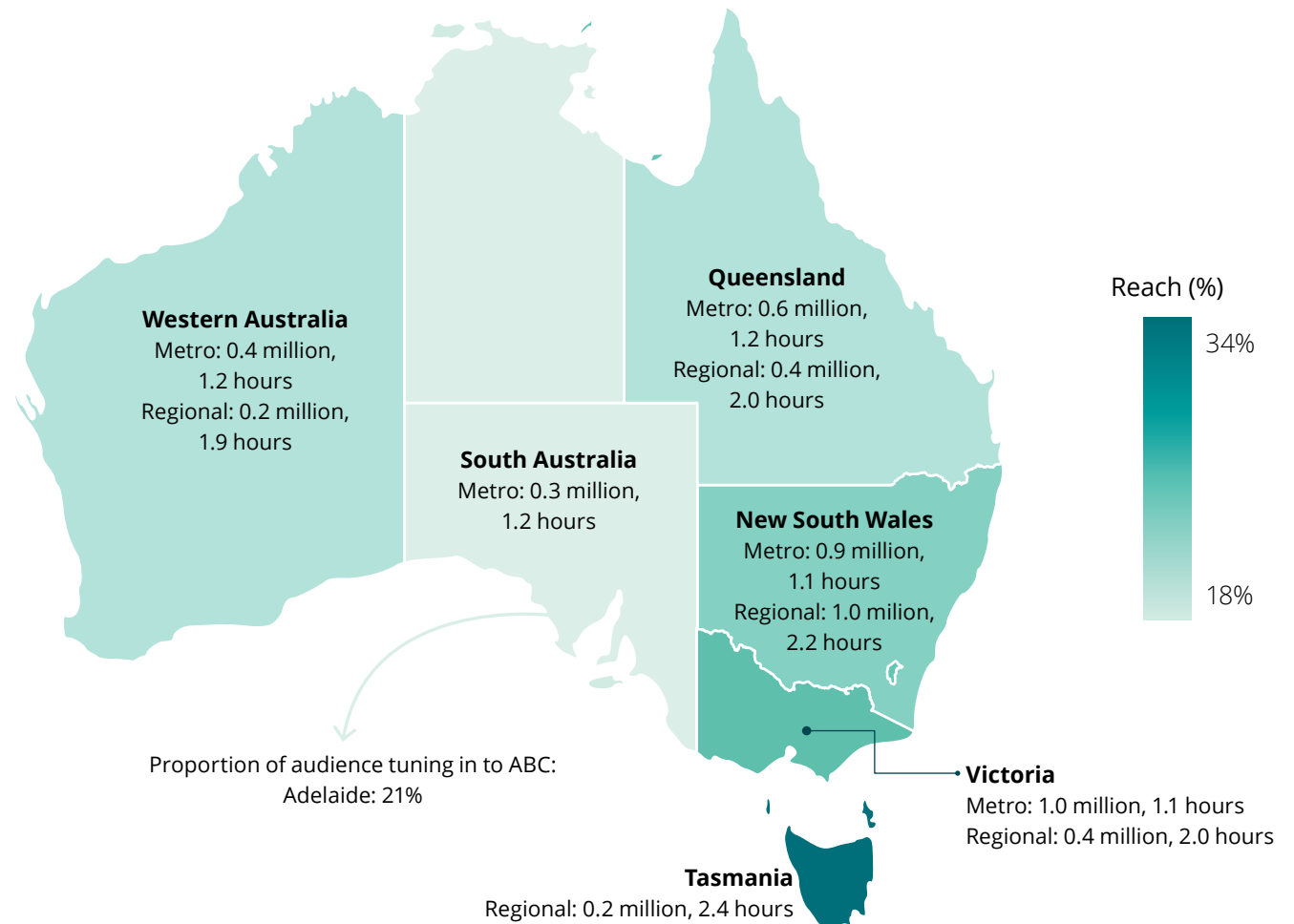
For most Australians, broadcast continues to serve as the primary gateway to the ABC's content. In 2024-25, approximately **20%** of the population (**5.4 million** people) watched broadcast ABC productions each week (on average), with total consumption nearing **7.8 million** hours.

This marks a **2.1%** increase in reach since 2022-23, underscoring the ABC's resilience even as overall FTA viewership has declined.^{1*}

Figure 4.1 shows the distribution of reach and average viewing time per person across Australia.



Figure 4.1: Average weekly reach and viewing time per person (2022-23 to 2024-25)



*While FTA broadcast reach has softened, there is evidence that minutes consumed has increased in recent years.

**Please note this is a conservative estimate, as it only considers broadcast ABC-commissioned content and excludes ABC iView consumption. Refer to Box 4.1 for further information.

Source: OzTAM, RegionalTAM

Note: Reach has been rounded to the nearest 0.1 million.

Audience engagement with ABC broadcast screen productions

Approximately 20% of the population watched ABC-commissioned content on broadcast television in 2024-25 - a 2% increase since 2022-23.

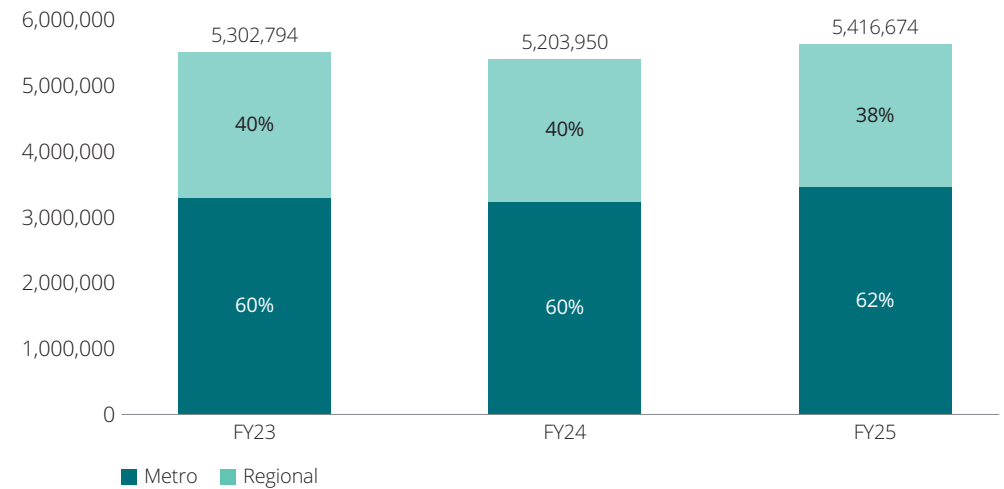
The ABC has contributed considerably to local screen content through a broad mix of genres and standout flagship programs. From 2022-23 to 2024-25, the network produced an average of ~40 hours of content each year across six genres. This attracted strong audiences, led by children's content in 2024-25 (24.4 million) and documentaries and factual programming (11.1 million).^{*} Flagship shows included *Bluey* (an audience of about 4.5 million) and *The Piano* (3.6 million).^{*}

The ABC's diverse programming slate engages Australians across all regions and demographics, reflecting the breadth of the nation's communities and interests. On average from 2022-23 to 2024-25, the ABC's commissioned broadcast content was watched weekly by:

- Over **25%** of the total regional population and 18% of the total metropolitan population. Metropolitan viewers have been more likely to engage with free video streaming services and other websites or apps to watch screen content in recent years.¹
- **39%** of those aged 55+ and 7% of 0-12 year olds in metropolitan areas. In regional areas, 33% of 0-12 year olds watched the ABC's commissioned broadcast content. This is explained by younger audiences, particularly in metropolitan areas, being more likely to use video streaming services and online subscription services to watch screen content in recent years.²
- A high proportion of the total women population (**20%**), despite women being less likely to watch FTA.³

The ABC's sustained investment in diverse, high-quality content underpins its broad appeal, ensuring continued relevance and engagement in a changing media landscape.

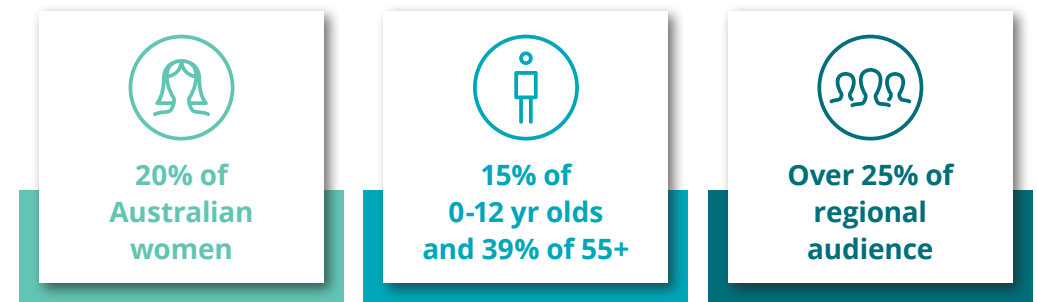
Chart 4.1: Total broadcast reach for commissioned productions – by market



Source: ABC, OzTAM, RegionalTAM

Note: Data includes broadcast commissioned programs only (excl. news)

Figure 4.2: Average reach (%) by geographic/demographics (avg. 2022-23 to 2024-25)



Source: ABC, OzTam, RegionalTam

Note: Data includes broadcast commissioned programs only (excl. news)

^{*}This data is for commissioned and acquired productions

Broadcast audience value of ABC-commissioned screen productions

Audiences watched nearly 7.8 million hours of ABC content in 2024-25 per week, representing an estimated audience value of \$2.4 billion. Beyond this, the ABC generates broader benefits, from convenience and educational support to positive mental health outcomes.

Accessing ABC-commissioned content free of charge provides substantial value to audiences across Australia. It can provide Australians with opportunities to relax, share in the unifying experience of live sport, foster creativity through the arts, find stress relief and social connection through comedy, and expand knowledge through documentaries and children's educational programming. To quantify the value of ABC screen content to audiences, a time-use value approach was taken.

Box 4.1: Method for calculating broadcast audience value

This report assumes a time-use value per hour of screen content of \$6.06, sourced from a 2016 report (and adjusted for inflation) for Screen Australia, *'What are our stories worth? Measuring the economic and cultural value of Australia's screen sector.'*¹ The value was derived by combining two methods: one using survey data to estimate audience consumer surplus (willingness to pay above market price) and choice value together with industry revenue, and another using OzTAM and RegionalTAM data on total viewing hours of Australian screen content. The time-use value was then applied to the length of time spent engaging with broadcast ABC produced content (~7.8 million hours per week in 2024-25), representing the welfare benefit derived from viewing time. It should be noted that this is a consumer welfare measure, not an estimate of economic contribution. Further, this estimate is contingent on the time-use value input, which can be estimated in multiple ways. For example, the Deloitte report, *'Valuing 50 years of Australia's Icon,'*² approximates time-use value using the value of private travel time – often estimated as 40% of average ordinary time earnings.³ Lastly, this method for calculating audience value only considers broadcast viewership; consumption via ABC iView is excluded.

International research highlights broader social, cognitive, and cultural outcomes associated with screen engagement, which partly underpin its audience value and contribute to wider positive spillovers:

- **Mental health and wellbeing:** Cultural engagement through drama, arts, comedy, entertainment and Indigenous programming can influence health outcomes. A UK study (2019) found that cultural engagement through the arts – including cinema and theatre – was associated with a 32% lower risk of developing depression among older people who participated at least every few months.⁵
- **Shifts in social behaviour:** Documentaries and factual programs can play a significant role in shaping public attitudes – including those produced by the ABC such as *Four Corners* and *Australian Story* and commissioned series such as the multi award-winning docuseries *Old People's Home for 4 Year Olds*. A 2025 Griffith University Research study found *Old People's Home for 4 Year Olds* has contributed to new job and funding opportunities in intergenerational practice, improving the social connectedness of communities around Australia as well as improving attitudes to ageing.⁶
- **Reducing loneliness:** ABC entertainment and drama productions introduce strong, relatable characters that audiences form connections with, providing a source of emotional engagement and value. A 2021 Spanish study found that parasocial relationships (PSRs) formed through engagement with characters in fictional television mimicked real-life relationships.⁷ While not equivalent, there is some evidence that people perceive parasocial relationships as helping to fulfil a degree of emotional needs.⁸

Using this methodology, the **audience value** of consumed broadcast content across 2024-25 was estimated at around **\$2.4 billion***. For comparison, in 2024-25 household final consumption expenditure on recreational and cultural services was approximately \$147.6 billion (original, current prices).⁴

*Please note this is a conservative estimate, as it only considers ABC-commissioned content that was broadcast on ABC, and therefore does not include ABC iView consumption. Refer to Box 4.1 for further information.

Digital viewing of ABC acquired and commissioned content

Digital engagement is a growth avenue for the ABC, with nearly 8 million weekly hours consumed through BVOD in 2024-25 (+23% since 2022-23).

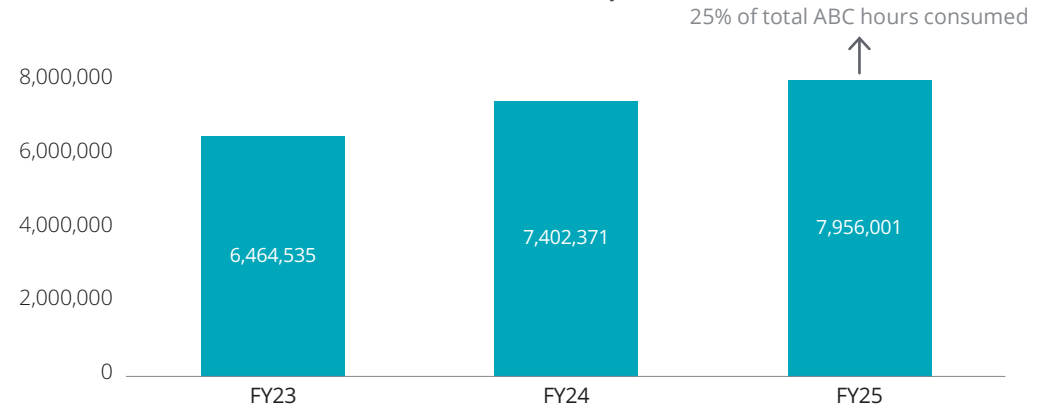
The ABC's digital engagement (for acquired and commissioned content) has accelerated markedly since 2022-23, with ABC iview emerging as a key driver of audience growth beyond traditional broadcast television. Weekly consumption on ABC iview (including both commissioned and non-commissioned content) approached **8 million** hours, reflecting a **23%** increase since 2022-23.* The ABC's early adoption of a FTA BVOD platform and continued investment in high-quality content has established its leading position within the market, now accounting for roughly one-quarter of total FTA BVOD hours.*

The expansion in BVOD consumption reflects a shift in behaviour from younger audiences. While broadcast remains the primary consumption platform for most genres, Children's Animation stands out, with over half its audience – nearly **9.5 million people** – preferring on-demand viewing.* Online streaming of children's programs now represents **almost half of BVOD hours**, growing by **10.1% since 2022-23** (+341k hours).* Young audiences are also engaging through newer distribution channels such as YouTube, where consumption of Children's content grew **162%** between 2022-23 and 2024-25 (+26k hours).* Aside from Children's content, Drama, Comedy and Indigenous programming are also being consumed at significant rates through ABC iview, representing approximately **20% of its audience**.*

Nearly 100% of the ABC's screen productions are accessible online at little to no cost (i.e., after accounting for internet and computer costs). This accessibility creates significant value by allowing Australians from diverse geographic and socioeconomic groups to enjoy premium content without subscription barriers. Viewers are able to engage with culturally relevant stories, educational series, and high-quality entertainment whenever and wherever it suits them, broadening participation in Australia's screen culture.

Ultimately, the ABC's multi-platform digital strategy positions itself to connect with new and evolving audiences, reinforcing its relevance in Australia's changing media landscape.

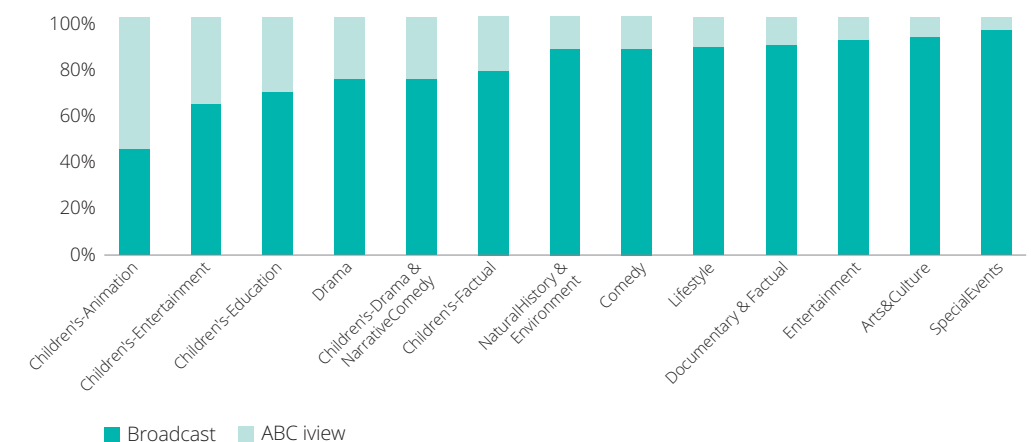
Chart 4.2: ABC BVOD hours consumed (metro market only)



Source: ABC, OzTAM, RegionalTAM

Note: This include commissioned and non-commissioned content

Chart 4.3: ABC share of audience by platform and genre (2025)



Source: ABC, OzTAM, RegionalTAM

Note: This include commissioned and non-commissioned content

*Data is for commissioned and acquired productions.

Cultural value of the ABC's commissioned screen content

The ABC delivers considerable cultural value as the nation's foremost commissioner of select Australian genres, strengthening national identity and reflecting stories that audiences recognise as distinctly Australian.

The ABC's investment in local and diverse content, along with its international reach, plays an important role in fostering national identity, social cohesion, and global recognition of Australian culture.

Empirical evidence reflects this contribution: surveys from 2016 to 2025 show that, on average, 78% of ABC viewers recognise its organisation as distinctly Australian and believe it plays a major role in building our national identity, while 77% agree the ABC reflects the cultural diversity of Australia.¹ This aligns with the ABC's Charter, which mandates content that both informs and entertains while contributing to national identity and representing diverse communities.

These audience perceptions are supported by the breadth of the ABC's local programming slate, which spanned across six genres and 315 productions in the three years up to 2024-25. The ABC's local production output was led by Documentaries and Factuals (86), Sports and Events (75) and Children's (43) programming. Through this diversity, the ABC facilitates Australian story-telling and representation across a wide range of communities, with its Content Division standing as the nation's largest commissioner of select genres of local content (e.g. childrens and drama).² In particular, the ABC has produced several comedy titles, playing an important role due to the challenge of exporting local humour. These programs allow Australians to connect with their distinctive voice and, at times, reach international audiences as well – for example, *Fisk*.

Across the broader industry, there has been a shift in the composition of local content production. Expenditure on children's content for broadcast television has declined to 44% below the five-year average in 2024–25. Investment in drama has also been disrupted, fluctuating in recent years and sitting 16% below the five-year average in 2024–25 for theatrical features.³ Meanwhile, in 2023-24, the ABC commissioned \$43.9 million in drama, \$20.3 million in children's programming, and \$42.6 million in documentaries and factual content, with these three categories accounting for 65% of the ABC's total contribution in 2023-24.*

The demand for Australian-made content remains strong: 81% of Australians want more locally made film and TV content, and 76–77% would like easier ways to identify it.⁴ The ABC helps to meet this demand by producing distinctly Australian content that enables audiences to distinguish and value genuinely homegrown media. This is particularly significant as SVOD platforms are not currently subject to local content quotas, while existing broadcaster quotas define 'local content' largely in production terms – requiring that programs be produced or post-produced in Australia or New Zealand with a specified level of Australian creative involvement.⁵

The ABC's cultural reach also extends globally. In 2024-25, the ABC reached over 11 million viewers through its international broadcast and digital services.⁶ This international presence supports soft diplomacy, promoting Australian values and perspectives across the Indo-Pacific, while also acting as a cultural export that strengthens Australia's global identity. By sharing local stories and landscapes abroad, ABC content contributes to tourism appeal, international engagement, and recognition of Australian creative talent.

Chart 4.4: Average annual hours of Australian content produced by genre – 2022-23 to 2024-25



Source: ABC

Note: This includes commissioned content only

*The 2023-24 figures from the ABC Annual Report are based on the whole-of-life budget at the time of commissioning. In contrast, the external co-commission data presented in this report are based on the whole-of-life budget calculated at the time of broadcast using an amortisation approach. These figures are therefore not directly comparable due to differences in timing and methodology.

Case study | The Newsreader

The Newsreader showcases Australian drama at its best, resonating strongly with both local and international audiences. It underscores the significant export potential of Australian drama and bolsters the global reputation of Australia's screen industry for producing high-quality, compelling content.

The first season of the ABC's *The Newsreader* aired in 2021 and quickly became a critically acclaimed drama series. The program was the ABC's most watched drama of 2021, reaching a total average audience of 1.5 million across all linear and BVOD platforms.¹

The show was produced by Werner Film Productions and supported by funding from Film Victoria and Screen Australia. The series was released in association with eOne.

The Newsreader is set in a fictional 1986 TV newsroom. It follows embattled and ambitious news anchor Helen Norville (Anna Torv) and fresh-faced journalist Dale Jennings (Sam Reid) as they navigate their careers, confront studio politics, and face personal challenges within the high-pressure world of broadcast news.

Central to *The Newsreader* is its authentic recreation of 1980s Australian television. Audience feedback emphasises the show's credibility in portraying the workforce dynamics of this era and its ability to evoke nostalgia among Australian viewers.

Filming took place in Melbourne, with each episode centred around a well-known news story that unlocks nostalgia for viewers. Its period setting, though historical, remains within living memory for many viewers, adding to its resonance.

Since its debut, *The Newsreader* has achieved considerable success both domestically and abroad. International sales of the program were managed by eOne, with high-profile broadcasters including BBC (UK), ARTE (France and Germany), and RTÉ (Ireland) among the buyers.

The series has aired in over 80 international territories, culminating in winning an Emmy Award in 2023.² When broadcast on the BBC, it was the biggest Sunday night show in five years upon release. Locally, all three seasons have garnered multiple Logie and AACTA awards since release.



The Newsreader
Image source: ABC.

Rachel Okine, Head of Scripted at ABC describes the main factor of success behind *The Newsreader's* international success to be the high production value.

.....
"The production value of this show is so good. It can sit in a prime time slot against any other international drama and really hold its own in terms of its visual aesthetic, quality, performance and surehandedness of direction."
.....

– Rachel Okine, ABC Head of scripted

.....
The success of *The Newsreader* is testament to the importance of strong creators, production companies, and a supportive broadcaster working in partnership.

The ABC's support began in early development, with close collaboration between the ABC and the creative team to refine scripts and make sure they were relevant to audiences today. Throughout production, the ABC provided financial, creative, and editorial backing. The ABC was able to draw on their expertise in Australian drama and leverage their networks to help facilitate the international distribution of the show.

Case study | The Newsreader

This production offered significant benefits to the local screen sector, employing a wide array of Victorian cast and crew. This involved providing extensive opportunities for early-career professionals and trainees on set. For example, a director attached during season three has since undertaken notable projects, illustrating how capacity building supports skill development and growth within the Victorian screen industry. The production injected around \$38 million into Victoria's economy, invested into a locally owned company and crew.

The series also served as a career springboard for actors involved, who gained wider profiles as the show progressed. This timing proved conducive as its stars were rising but still accessible to the ABC. For example, supporting actress Philippa Northeast, who played Kay Walters, went on to star in the 2025 ABC drama *The Family Next Door*.

*"The Newsreader was a game changer for Werner Film Productions. Before *The Newsreader* we were independently owned with a staff of three...now we have the backing of a global studio behind us and are a leading producer of Australian drama in Melbourne"*

– Joanna Werner, Director of Werner Productions

Program Insights



Awards
**16 wins &
35 nominations**



International
**Aired in 80
international territories**



Viewership
**Averaged 1.5 million
viewers across S1**



Production expenditure
\$38 million



The Newsreader

Image source: ABC.

The international success of *The Newsreader* has made it the most successful show produced by Werner Film Productions. This success contributed to BBC Studios acquiring Werner Film Productions in 2024. The acquisition was described as "a significant investment" in Australia's production ecosystem.³

The export value of Australian dramas like *The Newsreader* cannot be underestimated. Australian screen successes contribute significantly to exporting Australian culture and enhancing perceptions of the Australian spirit and lifestyle. This can fuel tourism, strengthen Australia's cultural brand, and deepen international audiences' familiarity and connection with Australian places.

International success stories can also benefit the broader Australian screen industry by paving the way for future productions. Maintaining a strong industry with internationally acclaimed on-screen talent elevates the global profile of Australian actors, attracting more overseas investment.

This success generates a virtuous cycle, extending Australia's reputation for world-class talent to writers, directors, and creatives alike. Moreover, international appreciation of Australian productions reinforces domestic pride and confidence in the local screen industry.

For Australian viewers, *The Newsreader* is an important reflection of local cities and culture, increasingly rare amid globalisation and the Americanisation of media.

For global audiences, Australian screen content acts as a cultural ambassador, reinforcing Australia's reputation for quality programs and boosting its international brand recognition.



Little J and Big Cuz

5. Children's wellbeing and development benefits

Image source: ABC.

Benefit to children's wellbeing and development

The ABC continues to commission Australian children's content and showcase authentic local voices, even as other broadcasters cut spending and international streaming services capture a growing share of the market.

The role of the ABC in children's content

The ABC plays a central and distinctive role in the provision of children's content in Australia, providing trusted, ad-free, and locally produced children's programming. Children's content is defined by the ABC as programming created for audiences aged 12 and under. Over the past several decades, the ABC's children's services have evolved significantly – from the establishment of dedicated broadcast channels such as ABC Entertains (previously branded as ABC3 and ABC ME) and ABC Kids, to the development of digital platforms such as ABC iview and a range of apps and educational resources. This evolution reflects both changes in children's viewing habits and broader shifts in the media landscape. Today, the ABC provides a substantial volume of children's programming (Figure 5.1).

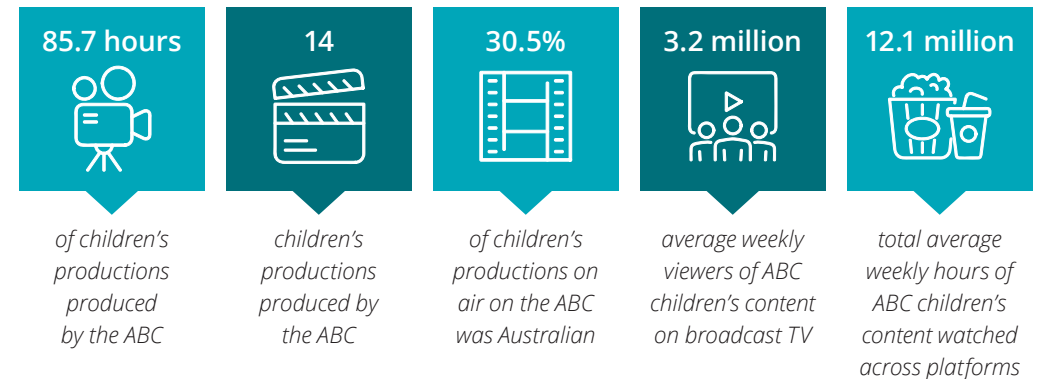
Importantly, the ABC's offering plays a unique role in an environment increasingly dominated by global streaming services. International services such as Netflix, Disney+, and YouTube now dominate children's screen time, limiting the visibility of Australian voices and stories. At the same time, expenditure on Australian children's TV/video on demand (VOD) drama titles remains limited, with the ABC first releasing five out of the eight total titles produced in 2023-24.¹ The 2021 Broadcasting Services Act reforms, which removed specific quotas for children's content, have contributed to a shift in industry priorities, with expenditure on local children's TV/VOD drama declining by 29% between 2022-23 and 2023-24.² These changes reflect evolving industry dynamics, where global services have previously not been obligated to support local or age-appropriate children's programming.

While key incentives such as the Producer Offset and state rebates remain in place, the decline in children's TV commissions has created a fragmented and intensely competitive landscape, driven by global competition and fewer opportunities for local production, despite the proven cultural and educational value of Australian children's content.

It follows that the ABC has become one of the few commissioners and broadcasters focused on showcasing authentic Australian voices on screen, reflecting Australia as it truly is for children. Its programming is age-appropriate, inclusive, and culturally relevant, often reflecting Australian experiences, voices, and values that may be underrepresented elsewhere. The content is freely accessible nationwide, ensuring equitable access for families regardless of geography or socioeconomic status.

In addition to audience benefits, the ABC provides vital support to the Australian children's screen sector through consistent commissioning, long-term partnerships with local producers, and the development of creative talent. Many of its programs are also designed to align with educational standards, reinforcing the ABC's role in supporting learning outcomes for children.³

Figure 5.1: Children's programming in Australia in 2024-25



Source: ABC (2025)

The remainder of this section explores the benefits supported by ABC children's content.

Benefit to children's wellbeing and development

The ABC's commissioning and broadcasting of Australian children's content supports children's wellbeing and development, with benefits that extend to young audiences, their families, and Australian society as a whole.

Benefits of children accessing high quality content

High-quality children's content has been shown in research to deliver significant wellbeing and developmental benefits. These include improved cognitive and language development, stronger social and emotional learning, and greater creativity and imagination. Through this provision of high-quality programming, the ABC helps deliver these important wellbeing and developmental benefits.

In addition to commissioning and broadcasting quality content, the ABC is uniquely Australian, showcasing authentic Australian voices, places, and stories. This cultural representation fosters a sense of identity and belonging in children, helping them see themselves and their communities reflected on screen while deepening their understanding of Australia's diverse society.

To explore these benefits, Deloitte Access Economics developed a wellbeing and development benefits framework informed by a literature review and stakeholder consultation (Figure 5.2). These benefits are experienced not only by young audiences, but also by their families and Australian society more broadly. This framework has been applied to the ABC's children's content to examine the benefits and distinctive contributions of the ABC, as outlined in the following slides.

Figure 5.2: Wellbeing and development benefits of children's television programs commissioned by the ABC



Source: Deloitte Access Economics (2026)

Benefit to children's wellbeing and development

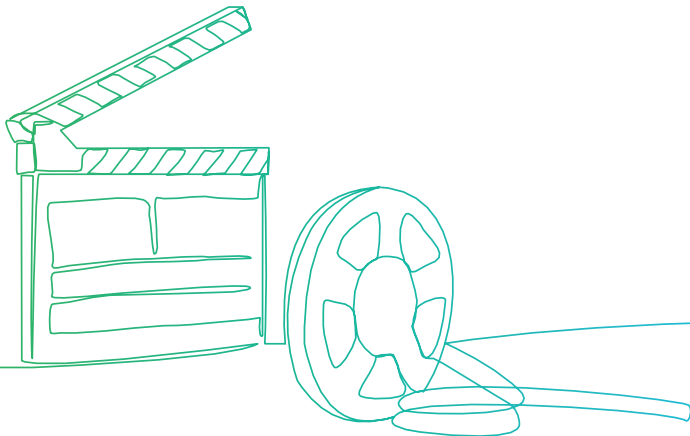
Australian children's content can promote cultural awareness and support identity formation, while also fostering social cohesion through shared experiences of what it means to be 'Australian' and by modelling positive behaviours and relationships.



Emotional and social development

The *Bluey* episode 'The Sign' had **12.5 million viewers** across broadcast TV and ABC iview, helping children to **navigate emotions** and **manage challenges**.

ABC-commissioned children's content supports emotional and social development particularly during formative years, by modelling values such as empathy, inclusion, resilience, and cooperation.⁴ The ABC's programming, such as *Bluey* demonstrates how everyday family interactions can model patience, empathy, and problem-solving in a way that resonates with both children and parents. By telling stories where characters experience setbacks, express vulnerability, or resolve conflicts in constructive ways, children are offered relatable strategies for building resilience and emotional regulation.⁵ The *Bluey* episode 'The Sign' was the top ABC program of 2024 and the highest program of all time on ABC iview (ranked on Total Audience).⁶ In the episode, Bluey's family plans to sell their home for Bandit's new job as everyone gathers for Rad and Frisky's wedding, but after a day of doubts and "signs" they call off the move and the wedding goes ahead. The episode explores themes, helping children to navigate their own emotions and manage challenges. The focus on emotional and social development is especially important against the backdrop of rising concerns about childhood loneliness and social isolation, sometimes described as a "loneliness epidemic".⁷



Cultural awareness, social cohesion and identity formation

Little J and Big Cuz season 2-4 had a **total audience of 1.1 million** people across broadcast and ABC iview in 2024, presenting **voices** and **experiences** that are **uniquely Australian**.⁸

ABC children's content fosters cultural awareness and identity formation by reflecting the diverse experiences, family structures, and communities that make up Australia. ABC-commissioned programming, such as *Little J & Big Cuz*, has been widely recognised for introducing young audiences to First Nations perspectives in ways that are engaging and accessible (see page 38-39). By presenting diverse voices and experiences that represent Australia and the viewer, the ABC enables children to better understand their place in society and provide an important sense of belonging while also appreciating the richness of Australia's multicultural landscape.^{9,10,11} This is important as ABC programming contributes to social cohesion by highlighting not only difference but also shared values and experiences that form part of a broader Australian identity.¹²



Case study | Little J and Big Cuz

Little J and Big Cuz is an animated television series commissioned as a school readiness initiative, designed to support Indigenous Australian children in making a successful transition from home to school.¹ The series is committed to both cultural authenticity and educational value.² Initially commissioned by NITV in 2017, the program became an ABC-NITV co-commission from season two.

Educational benefits

As a school-readiness program, the show aims to smooth the transition to school for Indigenous children, keep them engaged, and encourage schools to recognise the value of Indigenous Australian culture. *Little J and Big Cuz* also serves a dual purpose: it helps non-Indigenous teachers in rural and remote communities better understand Indigenous Australian culture and integrate Indigenous content in more meaningful ways.

.....
"The show's creation is another step in the empowerment of Aboriginal people to represent their contemporary lives from their perspective. Little J & Big Cuz has a profound relevance beyond its Indigenous audience and has delighted children, and indeed adults, nationwide."

.....
– Tony Thorne, *Little J & Big Cuz* Director³
.....

Little J and Big Cuz is also viewed by non-Indigenous children and makes an important contribution to improving cultural understanding from an early age. This understanding has long term societal benefits in terms of harmony and social cohesion.

The ABC's children's channel was a key drawcard for NITV to co-commission the program from season two, recognising that more Australian children would see it on the ABC. The ABC also provides safe, dedicated viewing pathways for children via ABC Entertains and ABC iview for kids. By contrast, the show would likely sit alongside adult content on alternate platforms.

The Australian Council for Educational Research (ACER), with a team of First Nations educators, built more than 300 free resources based on *Little J and Big Cuz* for early years. Resources include lesson plans, interactive games, and a digital book, encouraging the integration of Aboriginal and Torres Strait Islander perspectives in Australian classrooms.⁴

Each episode features a dual storyline, exploring a relatable, child-centred dilemma through an Indigenous Australian lens. For example, an episode might explore sharing in a school setting, with the lesson reinforced when Nanna takes Little J and Big Cuz out on Country. A study by ACER identified all the episodes supported the social and emotional development of children.⁵

Australian representation

Little J and Big Cuz showcases diverse Australian landscapes across its episodes, from desert to freshwater and saltwater Country. The show offers what ABC Children and Family Content's Mary-Ellen Mullane describes as a "very authentic slice of life", particularly for Australians living in remote and regional communities.

.....
Little J and Big Cuz is "an incredibly important cultural asset to us as Australians."

.....
– Mary-Ellen Mullane, ABC Children and Family Content
.....

Grounded in a familiar school setting, ***Little J and Big Cuz*** fosters connection across diverse experiences, as Australians from different backgrounds can readily relate to the stories.

Program Insights



Aired seasons
4



Indigenous Australian
languages translated to
17



Logie Award for the **Most
Outstanding Children's
Program** in 2018



Episodes
50

Case study | Little J and Big Cuz

Indigenous Australian representation

Little J and Big Cuz introduces First Nations characters and cultures to Australian animated children's television.⁶ First Nations children have not been well served or understood by mainstream media, largely due to underrepresentation. Many Australian audiences have had limited exposure to Indigenous Australian content. In the series, the stories focus on experiences many Indigenous Australian children can relate to, while recognising there is no single Indigenous childhood experience.

***Little J and Big Cuz* celebrates Indigenous Australian culture, with translations into 17 languages.** For many communities, this is the first time their language and culture have appeared on screen, resonating with children and elders alike. The series has inspired community-led engagement, including children in remote and regional areas creating their own versions at school, recording episodes in their languages and voices.

This proactive involvement highlights the show's impact in empowering Indigenous communities and fostering collaboration in education, cultural preservation, and revitalisation.⁷

"[Little J and Big Cuz] is just a different point of view that we haven't seen before within animation. I think that is probably why people respond to it so strongly."

– Deborah Mailman, Little J and Big Cuz lead voice actor⁸

In doing so, *Little J and Big Cuz* brings together stories across multiple Indigenous Australian groups, making it one of the first television series to unite such breadth in a single project. **The ABC co-commissioned the show in recognition of the importance of building audience familiarity and appreciation for Indigenous Australian culture from a young age.**

The show also features significant Indigenous Australian talent in its voice cast. On-screen representation matters for all Australian children, and especially for disadvantaged or Indigenous Australian children. As the adage goes, "you have to see it to be it".

"Translating future episodes into more Indigenous languages offers "unique opportunities for both language education and community ownership of the series."

– Ned Lander, Little J and Big Cuz Producer⁹

Indigenous Australian production and employment

Little J and Big Cuz supports Indigenous Australian employment and skills development across the screen sector. Entering its fifth season, the program is being produced in partnership with Indigenous-owned Galari Media.

The collaboration of First Nations talent both on-screen and behind the scenes reflects the series' dedication to culturally authentic storytelling and meaningful educational content.¹⁰

Little J and Big Cuz producer, Ned Lander, has created pathways for first-time Indigenous writers to gain their first broadcast credits by contributing episodes, while also offering established writers paid opportunities between larger projects.

Together, these initiatives are growing a pipeline of Indigenous Australian storytellers with experience in animation and children's television.

With **1.1 million total audience viewers in 2024**, *Little J and Big Cuz* offers engaging stories in a contemporary world, presenting positive views of Indigenous Australia and providing educational and employment benefits.¹¹



Little J and Big Cuz
Image source: ABC.

Benefit to children's wellbeing and development

Quality, age-appropriate Australian children's content provides opportunities for family connection and bonding, while fostering creative play and storytelling, and supporting the development of children's digital and media literacy.



Family connection and bonding

Little Lunch offers **relatable storylines** that **resonate across generations** in a school-based mockumentary, illustrated by a **total audience of 858,478 people** in 2024.¹³

ABC children's programming can also play an important role in fostering family connection and bonding, by creating shared viewing experiences that bring parents, caregivers, and children together. ABC programs such as *Little Lunch* are notable for appealing across generations, offering relatable storylines that resonate with both adults and children, offering a sense of nostalgia and encouraging conversations about everyday school and family life.¹⁴ Shared media moments of this kind can strengthen family relationships, provide opportunities for modelling positive behaviours, and support intergenerational learning.¹⁵



Digital literacy and safe media practices

Behind the News demonstrates how **younger generations** can use **digital platforms positively**, reinforcing **civic engagement** and **respectful participation online**.

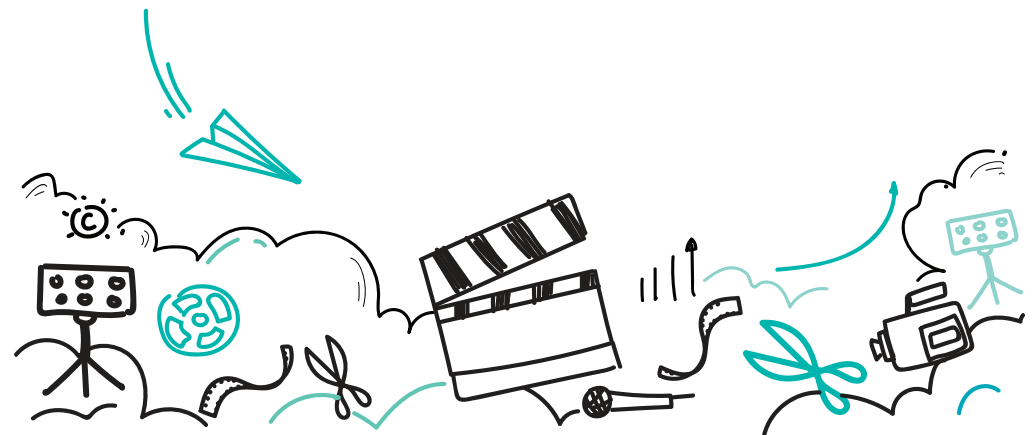
The ABC supports the development of digital and media literacy and healthy screen habits from an early age by providing a safe and reliable media environment for children.¹⁶ ABC Kids and ABC Entertains offer a trusted space where parents can be confident that children are only exposed to age-appropriate, high-quality programming. This helps families establish safe viewing routines, modelling what responsible screen use looks like and giving children a foundation for healthy media habits.¹⁷ *Behind the News* is the ABC's long-running classroom news program for kids that explains current events in an age-appropriate, engaging way. With *Behind the News* viewed in classrooms and with parents or teachers, it provides a platform for younger generations to meaningfully engage with news and current events in an age appropriate way. Given the growing volume of unregulated content available on global platforms and social media, it is important the ABC provides safe viewing environments and supports the development of children's resilience and digital literacy in line with Australia's eSafety Strategy 2022-2025.¹⁸



Imagination and creativity

Ginger and the Vegesaur (season 1-3) had a **total audience of 3.7 million people** in 2024, and an additional **435,185 viewers** for the **sing-along version** of season 1, encouraging children to be **creative**, through music, art or imaginative play.¹⁹

ABC-commissioned children's content nurtures imagination and creativity by providing young audiences with opportunities to explore new ideas, worlds, and ways of thinking.²⁰ Shows like *Ginger and the Vegesaur* and programs like *Let's Sing!* incorporate music, art or imaginative play to not only entertain but also inspire children to express themselves and experiment in their own lives. These shows help children to develop creativity as a core skill, which is increasingly recognised as critical for future learning and participation in the workforce.²¹



Benefit to children's wellbeing and development

ABC children's content strengthens language and literacy through storytelling, supports cognitive growth by fostering imagination and problem-solving, and delivers long-term social and economic benefits by developing strong communication and critical thinking.



Language and literacy skills

Across all seasons and specials, ***Play School*** had a **total audience of 3.6 million** people in 2024, building **vocabulary, listening skills** and **early comprehension** for children.²²

ABC children's programming supports children's language and literacy development. Shows such as *Play School* have introduced generations of Australian children to songs, stories, and interactive play that build vocabulary, listening skills, and early comprehension.²³ Similarly, narrative-driven programs like *Pencil Pals* provide opportunities for children to engage with rich dialogue and storytelling, reinforcing both oral language skills and a love of reading.²⁴ The ABC also invests in schools' education content to strengthen literacy outcomes, like *ABC Education Story Time*. The series introduces Australian authored picture books read by Australian teachers who spark students' curiosity with imaginative stories and strengthen their text, word and visual knowledge. These elements are fundamentals of high-quality literacy education. Each episode concludes with recommended learning activities designed to inspire participation and deepen young readers' engagement.²⁵



Cognitive development

Behind the News demonstrates how **younger generations** can use **digital platforms positively**, reinforcing **civic engagement** and **respectful participation online**.

ABC children's programming fosters cognitive development and early learning, with many shows deliberately designed to support foundational skills such as numeracy and critical thinking. Programs like *Australia's Extinct Megafauna* introduce children to natural history and evolution through a concise yet engaging exploration of Australia's prehistoric giants in a six-part animation series.²⁶

The series is also evidence of the partnerships the ABC has in Australia as the series was developed by ABC Education in collaboration with Museums Victoria and several paleontologists, and the Victorian Academy of Teaching and Leadership also developed educational resources to support teachers and extend student learning.²⁷ By combining entertainment with structured learning opportunities, ABC programs encourage curiosity, memory, and reasoning skills that form the basis for later academic achievement.^{28,29}



Long-term economic and social outcomes

Early educational engagement through quality television content, like the ABC, is linked to **higher educational attainment** which in turn leads to **improved employment prospects, greater lifetime earnings**, and **stronger social participation**.

The ABC contributes directly to long-term educational, social, and economic outcomes by commissioning programs which support literacy, numeracy, critical thinking, and social-emotional skills, helping children build the foundations for school readiness and lifelong learning.³⁰ Early educational engagement through quality television content, like the ABC, is linked to higher educational attainment.^{31,32} Higher education attainment and school completion leads to improved employment prospects, and greater lifetime earnings, as well as stronger social participation and civic engagement.³³ In an increasingly technology focused world, the development of media literacy, through viewing and engaging with the ABC's children's content, also importantly equips young audiences with the skills to critically engage with all forms of media.

By producing locally relevant, inclusive, and accessible content, the ABC ensures all Australian children benefit. Investment in the ABC's children's programming supports individual growth and generates broader societal and economic returns, reinforcing the value of public broadcasting as a tool for national wellbeing.



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Landline reporter Halina Baczkowski and camera operator Glen Armstrong interviewing Toni Ward, Director of Land, Windlab at Hughenden in North West Qld.



7. Appendices

Appendix A

Economic contribution methodology

For this study, productions commissioned in three reference years (2022-23, 2023-24, 2024-25) are considered. While the activity associated with the productions commissioned may occur over different or longer periods of time, production expenditure and associated economic activity are assigned to the year of commissioning for simplicity. All figures presented in this report are in 2024-25 dollars.

Economic contribution modelling was undertaken separately for internal productions and externally commissioned productions. Data was provided at the state and territory level and aggregated to the Australian level.

The *Economic contribution of screen productions commissioned by the ABC* was modelled by Deloitte Access Economics in 2021. This updated 2026 report uses a comparable economic contribution methodology however it is important to note that the ABC now recognises expenditure associated with production funding at the time of broadcast (previously, this was recognised at the time of commissioning). Therefore, caution should be exercised when comparing trends in production funding between the 2026 and 2021 reports due to the change in when expenditure is recognised.

Data inputs

Economic contribution analyses are dependent on the extent and quality of data available. In undertaking this analysis, Deloitte Access Economics has relied upon the financial information and data provided by the ABC about their internal productions and externally commissioned productions. Production expenditure data has not been independently verified by Deloitte.

The expenditure data provided included total production expenditure, itemised by expenditure categories, with proportions allocated to internal and external productions for each state. For external co-commissioned productions, the proportion of total expenditure contributed by the ABC was also provided, allowing an estimate of the total expenditure for these productions.

The number of FTE staff employed by the ABC in the operations and management of screen productions was provided by financial year and state.

Additional data sources included ABS labour force publications, along with IBISWorld industry wage estimates, which were used to estimate employment for external co-commissions based on wage expenditure.

Data inputs (cont.)

Given future streams of revenue from productions are unknown and the ABC is funded by the Australian Government rather than operating as a profit-seeking business, a depreciation and amortisation approach has been adopted to estimate returns to capital for internal production expenditure. This used assumptions from ABC annual reports and the latest ABS data on Film, Television and Digital Games.

Overseas production expenditure (i.e. imported goods and services), is assumed to be below 1% of total production spend, based on 2021 data. This figure has been retained as a more recent estimate was unavailable.

Throughout, Deloitte undertook benchmarking against published industry data to test the reasonableness of inputs and assumptions.

Input-output modelling

Economic contribution is a measure of employment and value added associated with the economic activity of a particular industry or firm in an historical reference year. This is estimated by Deloitte Access Economics' Regional Input-Output Model (DAE-RIOM), which is based on the ABS Input-Output (IO) tables. IO tables contain information about an ABS industry's profile of intermediate expenditure across different industries.

Employment

Employment measures the number of jobs supported by ABC-commissioned screen productions in FTE terms and does not double count jobs across the economy. Employment is measured by the direct employment through jobs directly involved with screen productions, and the indirect employment it supports across upstream industries. Indirect employment is calculated using Deloitte's model based on the ABS IO tables, based on the ratio of FTE employment per output.

Appendix A

Economic contribution methodology

Input-output modelling (cont.)

Value added

Value added measures the value of goods and services generated by the activity associated with productions commissioned by the ABC. Value added is calculated by summing the payments to labour, gross operating surplus (GOS), and production taxes less subsidies.

GOS represents the value of income generated by the entity's direct capital inputs, generally measured as the earnings before interest, tax, depreciation and amortisation (EBITDA). For the general government sector (which includes the ABC), GOS is equal to the consumption of fixed capital (taken to just be depreciation and amortisation).

Value added is the most appropriate measure of a firm's GDP at the national level, or gross state product (GSP) at the state level. The value added of each industry in the value chain can be added without the risk of double counting across industries caused by including the value added by other industries earlier in the production chain.

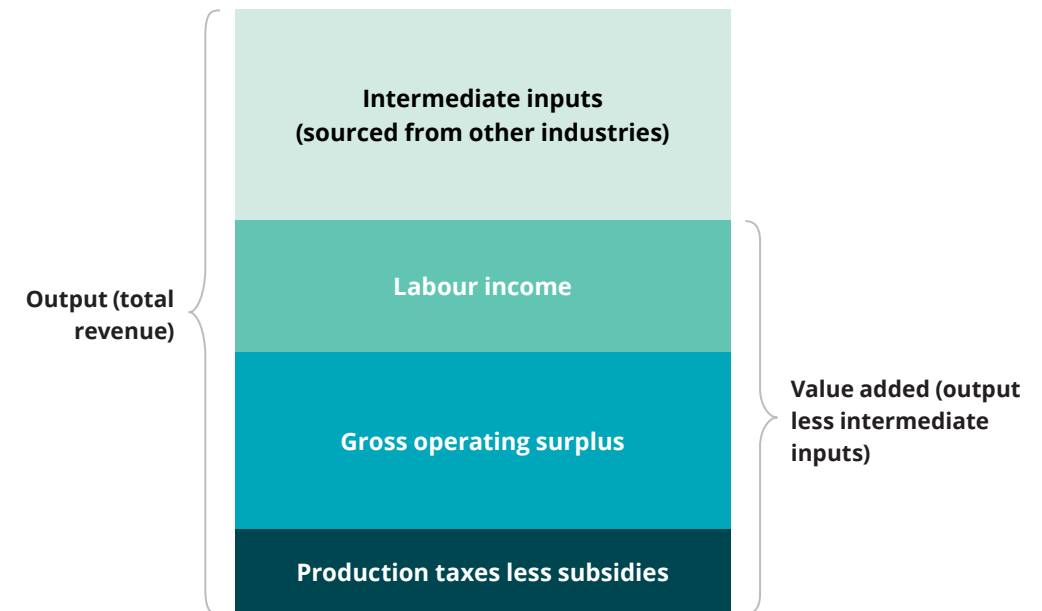
The economic activity accounting framework is presented in Figure A.1, showing how total revenue can be disaggregated into component parts to measure the economic contribution of an entity or industry. The framework demonstrates the definition of value added being the difference between total revenue and intermediate inputs.

Direct and indirect value added was estimated.

- The *direct* economic contribution is a representation of the flow from labour and capital involved in the economic activity itself. For example, the employment and wages of the cast and crew working directly on the productions and a measure of gross operating surplus (GOS) – here, a measure of returns to capital.
- The *indirect economic* contribution is a measure of the demand for goods and services produced in other industries as a result of demand generated by economic activity associated with ABC-commissioned productions. The profile of intermediate expenditure is converted into indirect value added by applying the industry relationship between value added and output from the ABS IO tables.

Deloitte Access Economics does not consider 'induced effects' or Type II multipliers in its IO analyses. These are effects generated throughout the broader economy due to employees spending their wages/salaries paid to them by their employer.

Figure A.1: Components of value added



Source: Deloitte Access Economics.

Appendix B

Detailed economic contribution results

Appendix B presents the total economic contribution of all ABC-commissioned productions, including those solely internally produced by the ABC, and those commissioned with other external parties. Here, the results are presented for Australia on aggregate, as well as by jurisdiction, highlighting the implications of the productions for state and territory economies.

Table B.1: Economic contribution of all ABC productions, by jurisdiction, 2022-23

	Direct		Indirect		Total	
	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs
Australia	\$192.2	1,475	\$79.9	657	\$272.2	2,121
New South Wales	\$112.2	847	\$40.0	325	\$152.2	1,166
Queensland	\$12.8	99	\$7.7	61	\$20.5	159
Victoria	\$46.8	370	\$20.1	166	\$67.0	533
Western Australia	\$2.6	21	\$2.5	17	\$5.1	37
Northern Territory	\$0.1	1	\$0.2	1	\$0.3	2
South Australia	\$5.3	42	\$3.3	29	\$8.6	71
Tasmania	\$12.1	95	\$5.2	52	\$17.3	146
Australian Capital Territory	\$0.3	-	\$1.0	6	\$1.3	6

Source: Deloitte Access Economics modelling based on data provided by the ABC.

Notes: All figures are in 2024-25 dollar terms. Results may not total due to rounding. The results of the economic contribution of ABC external commissions relate to the total contribution of these productions to Australia's economy. These productions are funded by both the ABC and at least one other entity, such as state screen agencies or Screen Australia. All parties play a role in the resulting economic contribution, which cannot be solely attributed to any one entity. State breakdown may not add to total national contribution due to rounding.

Appendix B

Detailed economic contribution results

Table B.2: Economic contribution of all ABC productions, by jurisdiction, 2023-24

	Direct		Indirect		Total	
	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs
Australia	\$178.2	2,235	\$77.2	650	\$255	2,880
New South Wales	\$93.8	1,159	\$35.3	291	\$129.2	1,447
Queensland	\$2.8	21	\$3.9	29	\$6.7	51
Victoria	\$54.2	684	\$22.7	192	\$76.9	875
Western Australia	\$2.1	28	\$2.5	17	\$4.6	45
Northern Territory	\$0.2	1	\$0.2	1	\$0.4	2
South Australia	\$12.0	166	\$6.0	56	\$18.0	221
Tasmania	\$12.7	176	\$5.6	58	\$18.3	233
Australian Capital Territory	\$0.3	-	\$1.0	6	\$1.3	6

Table B.3: Economic contribution of all ABC productions, by jurisdiction, 2024-25

	Direct		Indirect		Total	
	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs	Value added (\$m)	FTE jobs
Australia	\$171.2	2,118	\$72.7	588	\$243.9	2,713
New South Wales	\$98.6	1,223	\$37.4	304	\$135.9	1,528
Queensland	\$5.0	58	\$4.3	32	\$9.3	91
Victoria	\$50.1	603	\$20.1	166	\$70.2	771
Western Australia	\$11.8	164	\$6.4	49	\$18.3	213
Northern Territory	\$0.2	1	\$0.2	1	\$0.3	2
South Australia	\$2.1	26	\$1.7	14	\$3.9	41
Tasmania	\$3.2	44	\$1.7	16	\$4.9	61
Australian Capital Territory	\$0.2	-	\$0.9	6	\$1.1	6

Source: Deloitte Access Economics modelling based on data provided by the ABC.

Notes: All figures are in 2024-25 dollar terms. Results may not total due to rounding. The results of the economic contribution of ABC external commissions relate to the total contribution of these productions to Australia's economy. These productions are funded by both the ABC and at least one other entity, such as state screen agencies or Screen Australia. All parties play a role in the resulting economic contribution, which cannot be solely attributed to any one entity. State breakdown may not add to total national contribution due to rounding.



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